



Basic Users Guide
Version 6.0.5
Deficiency Tracking System



Contents

Installing DefTrack.....	2
Starting up DefTrack	5
Basics.....	6
Changing Passwords	8
How to Add an ES&H Inspection.....	11
How to Modify Records.....	16
How to Delete Records.....	17
How to Use Search.....	19
How to Save/Restore the Current Selection.....	22
How to Sort the Current Selection.....	24
How to Create a Quick Report.....	26
How to Insert, Delete, and Size Columns.....	27
How to Specify/Change or Delete a Field From a Sort Order.....	29
How to Insert Break Levels.....	30
How to Add Headers, Footers, Page Numbers, Time, and Date.....	32
How to Accept a Page Setup and Print a Quick Report.....	33
How to Save and Load a Quick Report Template.....	34
How to Export Data.....	36
How to Import Data.....	45
How to Archive Delete.....	51
How to Use Show Items.....	54
How to Use Show Inspections.....	56
Quick Export.....	58
How to Use the Global Update.....	60
How to Back Up the Data Base and Monthly Roll Ups.....	66
Add to Roll Up... ..	67
Recordless Roll up.....	69
Multiple Files Import.....	71
Merge Inspections.....	73
Organization Codes	76
How to Use the Special Guest Features.....	84
How to Export Special Guest Data.....	89
How to Import Special Guest Data.....	90
INDEX.....	91

Requirements

In order to run and use DefTrack, certain minimum requirements of hardware, software, and memory must be met.

Hardware

DefTrack requires the following hardware:

- Apple Macintosh Quadra or later model
Macintosh computer or Mac OS compatible equivalent.
- Hard disk drive with at least 8MB free space.
- 13" monitor or larger - color preferred.

Software

DefTrack requires System 7.0 or later Apple System software

Try not to run DefTrack with Oracle client/server applications, because these programs may cause DefTrack to run erratically.

Memory

DefTrack uses 6MB of RAM to run.

Installing DefTrack

Obtaining DefTrack Software

A folder is available to all DefTrack administrators which contains the following items – DefTrack application, a copy the Users Manual, a blank data file, org codes and other important components of DefTrack.

To log on to the server:

Steps	Administrators Action Only
1.	Open Chooser
2.	Select APPLESARE
3.	Select zone ARO
4.	Select the ARO Database
5.	In the log in window type in the name DTADMIN
6.	The password is ????
	If you forgot the password call the ARO DefTrack Manager.
Notes	<i>The name and password are case sensitive so capitalizing or not as indicated is important.</i>
7.	Select DefTrack Administrators
8.	Click on Okay and close your Chooser

Please take what you need and log off. Only one user at a time can log in using the name DTADMIN. While you are logged in no one else can access the information.

Installing the software

Steps	Administrators Action Only
1.	Remove the old DefTrack application, if present on your system, application by dragging the icon into the Trash and selecting “Empty Trash” from the Special menu. THIS IS A NECESSARY STEP . . . YOU REALLY WANT (AND NEED) TO DO THIS!
2.	Drag the following files (ES&H DefTrack application and ReadMe files) from the DefTrack administrators server into your ES&H DefTrack folder.
3.	Double click the ES&H DefTrack application icon.

Installing DefTrack, Continued

The following window will appear:



Steps	Action
4.	<p>Click on the Administrator or Data Entry user type and log-on with the correct password in the ReadMe file.</p> <p>Click the OK button, while holding down the option key _.</p>

A window similar to this will appear:

Installing DefTrack, Continued

Steps	Action
5.	Select your ES&H DefTrack.data and click on the Open Data File button.
Warning	<i>Make sure that this is the data file you really want to open.</i>

Starting up DefTrack

Steps	Action
1.	<p>Double click on the DefTrack icon in your ES&H DefTrack folder. (See example below.)</p> <div data-bbox="846 436 1075 583" data-label="Image"> <p>The image shows a square icon with a blue background. Inside the square, there are stylized, overlapping lines in yellow, red, and blue that form a shape resembling the letters 'IV'. Below the icon, the text 'DefTrack Vx.x.x' is displayed in a black, monospaced font.</p> </div> <p>Warning <i>Never, Never, Never open DefTrack by clicking on the datafile. DefTrack remembers the last datafile it opened. If you have more than one datafile you could inadvertently open the wrong datafile. Always open DefTrack by clicking on the DefTrack application.</i></p>
2.	<p>Select Data Entry User or Administrator, then either Tab to or click in the Password box.</p> <div data-bbox="747 886 1203 1341" data-label="Image"> <p>The image is a screenshot of a 'Password' dialog box. It has a title bar that says 'Password'. Inside the dialog, there is a 'User List' section with a list box containing the following items: 'Designer', 'Administrator', 'Data Entry User', 'Special Guest', and 'Guest (Browse only)'. The 'Data Entry User' item is currently selected. Below the list box is a 'Password' label followed by a text input field. At the bottom of the dialog are two buttons: 'Cancel' and 'OK'.</p> </div> <p>Warning Enter your password (It must be greater than 5 characters long) and click OK. You should be now at the start-up screen.</p> <p>Warning <i>The password is case sensitive. Make sure Upper is Upper and lower is lower case.</i></p> <p>Hints <i>To change to another data file click OK while holding down the Option key.</i></p> <p><i>Have your DefTrack application and DefTrack data file in the same folder. This will make it easier for you to find all the exported item files and MADS error files.</i></p>

Basics

How to Use DefTrack Menus

Before entering data into DefTrack, you should familiarize yourself with these 3 important DefTrack menus **View**, **Enter**, and **Select**

View Menu

View	
Inspections	⌘1
All Inspection Items	⌘2
Verifications	⌘3
Item Priorities	⌘4
Compliance Codelist	⌘5
Codelist Usage Areas	⌘6
Organizations	⌘7
Items: Next ARO Roll Up	⌘8
Items: Last ARO Roll Up	⌘9

There are different kinds of data and record formats in which you can enter and view data in DefTrack. The View menu determines which record type you will be working on.

Whether you are creating new records, modifying existing records, sorting records, deleting records, or searching for records, you must designate what type of records you wish to work with by using the **View** menu.

Once you have made your choice a predefined listing of fields will appear.

Enter Menu

Enter	
New Records	⌘N
Modify Records	⌘M
Delete Selection	
Apply Mgr-Responsibility	
Global Updates...	
Special Modify Records	⌘J
Special Global Update	
Reset Roll Up...	

To create new records, modify records, or delete records, go to **View** and choose the correct record type and then go to the **Enter** menu and choose your action.

You can only enter new Inspection Items through the Inspections view.

You may delete or modify Inspection Items through the Inspections or the Items view.

Basics, Continued

Select Menu

Select	
Show All	⌘S
Show Subset	⌘+
Omit Subset	⌘-
Save Current Selection	⌘=
Add Selection to Saved Set	
Restore Selection	
Omit Saved Set from Selection	
Omit Selection from Saved Set	
Special Item Search	
Show Inspections	
Search...	
Search by Index...	
Search by Example...	
Sort...	
Save Selection as Set...	
Load Set...	
Create Temporary View	

The Selection menu allows you to search for records, sort records, save subsets of searches, produce search templates, and temporarily create a listing of found items.


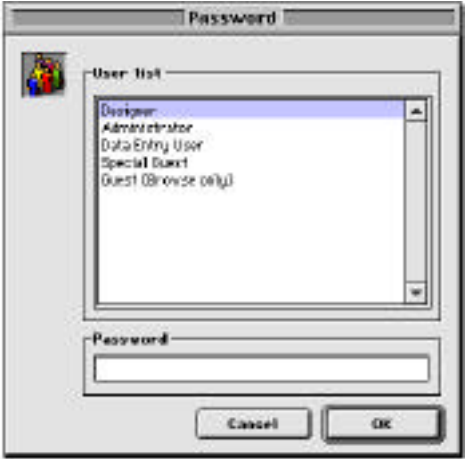
Selecting Items in a List

Click	Single Click selects one item.
⌘-Click	By holding down the command key while clicking, you can select multiple items
Shift-Click	By holding down the Shift key while clicking, you can select a range of items. Click the first item hold down the shift key, and click the last item in the range – all items in between will be selected.



Changing Passwords

Background




The best way to provide security for your database is to password protect and change the password a couple times a year.

Steps	Action
1.	<p>From the splash screen chose Access from the File menu.</p>  <p>The following window will appear:</p>  <p>Type in your password in your appropriate access level – Click OK.</p>

Changing Passwords, Continued



Steps	Action
2.	<div data-bbox="565 363 1344 982">  </div> <p data-bbox="565 1014 1318 1081">To change your password click on Change Password or click on Done to cancel your actions.</p>
3.	<div data-bbox="565 1113 1360 1528">  </div> <p data-bbox="565 1560 1364 1627">Enter new password, try not to make your passwords too obvious i.e. using your (name, kids name, date of birth, etc.) then click OK.</p> <p data-bbox="565 1654 1347 1690">Remember to write down your password and put it in a safe place.</p> <p data-bbox="451 1717 506 1753">Hint</p> <p data-bbox="565 1717 1364 1814"><i>If you can't remember your password you can download a fresh copy of DefTrack from the DefTrack Administrators server and start fresh with the default passwords.</i></p>

Changing Passwords, Continued

Steps	Action
4.	<div data-bbox="656 369 1281 701">  </div> <p data-bbox="561 735 1341 800">Re-enter your password to confirm your original input – click OK. Click Cancel if you do not want to discontinue this process.</p>
5.	<p data-bbox="561 831 938 863">The following window appears:</p> <div data-bbox="647 894 1292 1236">  </div> <p data-bbox="561 1268 678 1299">Click OK.</p>
6.	<div data-bbox="677 1335 1260 1751">  </div> <p data-bbox="561 1785 1341 1843">Click on Done if you are satisfied with your new password. If you want to change your password again, click on Change Password.</p>


How to Add an ES&H Inspection

Use the procedure below to add data to an ES&H Inspection form.


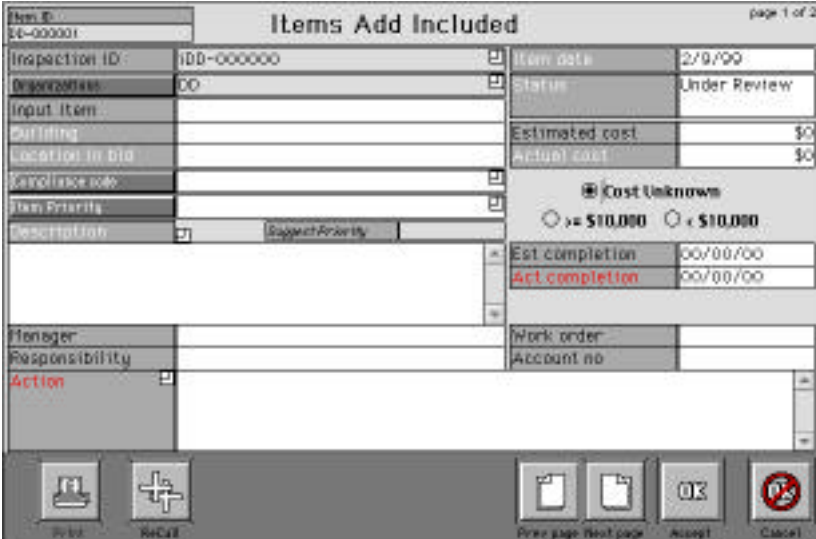
Steps	Action
1.	<p>Select Inspections from the View menu.</p> 
2.	<p>Select New Records from the Enter menu.</p> 
Notes	<p>A blank ES&H Inspection form, which includes the inspection date and the ID number, will appear on the screen..</p>

How to Add an ES&H Inspection, Continued


[illegible]

Steps	Action
3.	<p>Do the following to enter the data provided by the inspection team:</p> <ul style="list-style-type: none"> • Fill in the “Inspection Name.” • Tab to “Inspection Type” and make the appropriate selection from the “Choices for Inspection type” menu. • Double Click on Selection. 


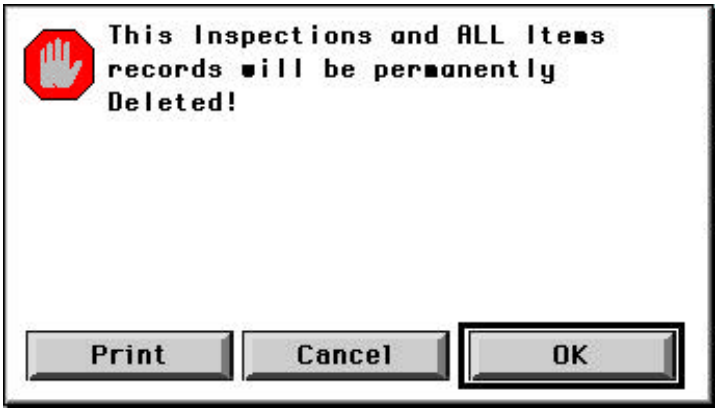
How to Add an ES&H Inspection, Continued

Steps	Action
4.	<ul style="list-style-type: none"> Click or tab to “Inspection Team” and type the data provided. <p>To enter an inspection item, Click on the “Add” button.</p>  <ul style="list-style-type: none"> When the ES&H Inspection item form appears, fill-in all the fields colored in white. If the item has a Status of complete, fill-in the fields colored in red also. 
Notes	<p>The new item ID number automatically appears when you click on the “Add” button.</p>

How to Add an ES&H Inspection, Continued

Steps	Action
5.	<p>Click on the Accept button at the bottom of the screen to save the data entered. A Dialog box will appear asking you if you want to use the current date as the item date.</p> <div data-bbox="636 468 1305 846">  </div> <p>If the current date is correct click on the OK button to go on to the new item input form. A new blank Items Add form will appear for you to add additional item information.</p> <p>If this is not the item date you want to use click on the Reject button to input the correct date.</p> <p>Time Saver</p> <p><i>You can use the Recall button. to transfer all the data you inputted from the previous record to the current record you're in.</i></p> <p><i>You may or may not have data to enter on page 2 (Verifications); however, you will add more information after management review. At that time, see the "How to Modify Records" section in this guide.</i></p> <p>Notes</p> <p><i>Do not click on the cancel button. If you do, your data will be lost.</i></p> <p>Warning</p>

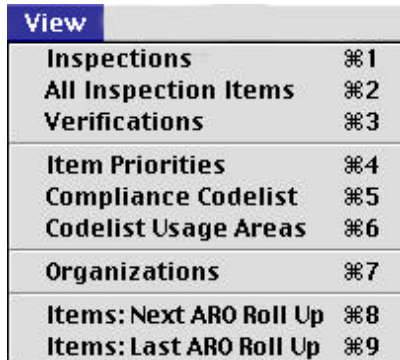
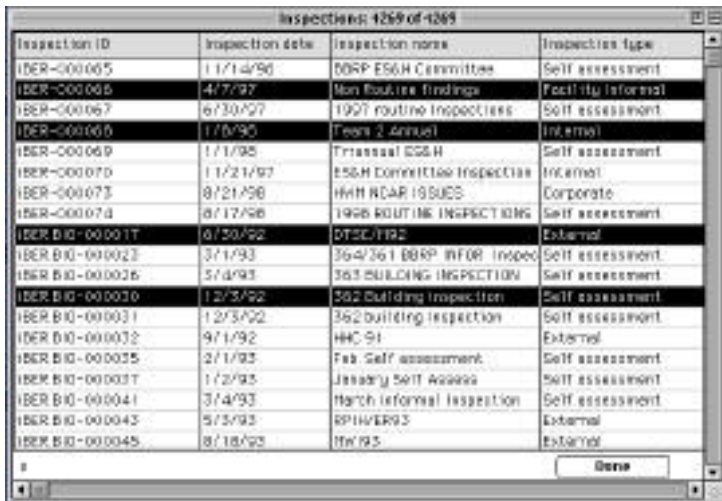
How to Add an ES&H Inspection, Continued

Steps	Action
6.	<p>When you no longer have any new item information to enter and you are in a blank Items Add input form click the Cancel button. The Inspections Add or Modify form will appear with all the information you have inputted.</p>  <p>If no more changes are to be made, click on the Accept button to bring up a new blank Inspection Add form. You may now add new Inspection data or click on the Cancel button to end your session.</p>
7.	<p>If you choose the Cancel button a Dialog box will appear asking you if you really want to delete the currently displayed inspection. If you do, click OK. if not click Cancel.</p> 
Notes	<p>Write the computer-generated "Inspection ID" on the original, hand-written ES&H inspection form.</p>

How to Modify Records

Modify



Use the procedure below to modify (edit/change) ES&H Inspections or Inspection Items.

Steps	Action
1.	<p>Select the appropriate entry from the View menu.</p> 
2.	<p>Highlight the records to be modified.</p> 
3.	Select Modify Records from the Enter Menu.
4.	Edit the appropriate fields.
5.	To save the changes made, click the Accept button.

How to Delete Records

Deleting from the enter menu




Use the procedure below to delete records from the **Enter** menu.

Steps	Action
1.	<p>Select the appropriate entry from the View menu to delete ES&H Inspections or Inspection Items.</p> 
2.	<p>Highlight:</p> <ul style="list-style-type: none"> Records to be deleted. Choose Delete Selection from the Enter menu. The dialog box below will appear. 
3.	<p>Click on Delete to proceed with deletion or Cancel to cancel deletion process.</p>
Warning	<p>Once you click on Delete the record is gone. You cannot undo.</p> <p>Also, when deleting the Inspection record all of the associated items and verifications will also be deleted.</p>

How to Delete Records, Continued

Deleting items while creating or modifying Inspection records


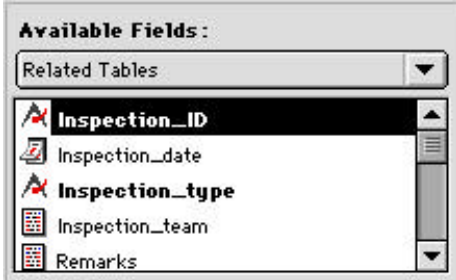
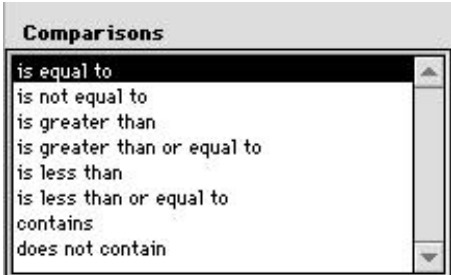
Use the following procedure to delete items while creating a new record or modifying an existing record from the Inspections Modify or Add view. Note that the **Delete** button will be in the active mode, from the ES&H Inspection Form only.

Steps	Action
1.	<p>Highlight the item to be deleted and click on the delete button . The following message will appear if you are in the ES&H Inspection form:</p>  <p>Or if you are in the Inspection Item Verification Page the message box will look like this:</p> 
2.	Click on Delete to proceed with deletion or Cancel to cancel process.
Warning	Once you click Delete the record is gone. You cannot undo.

How to Use Search

Search Editor

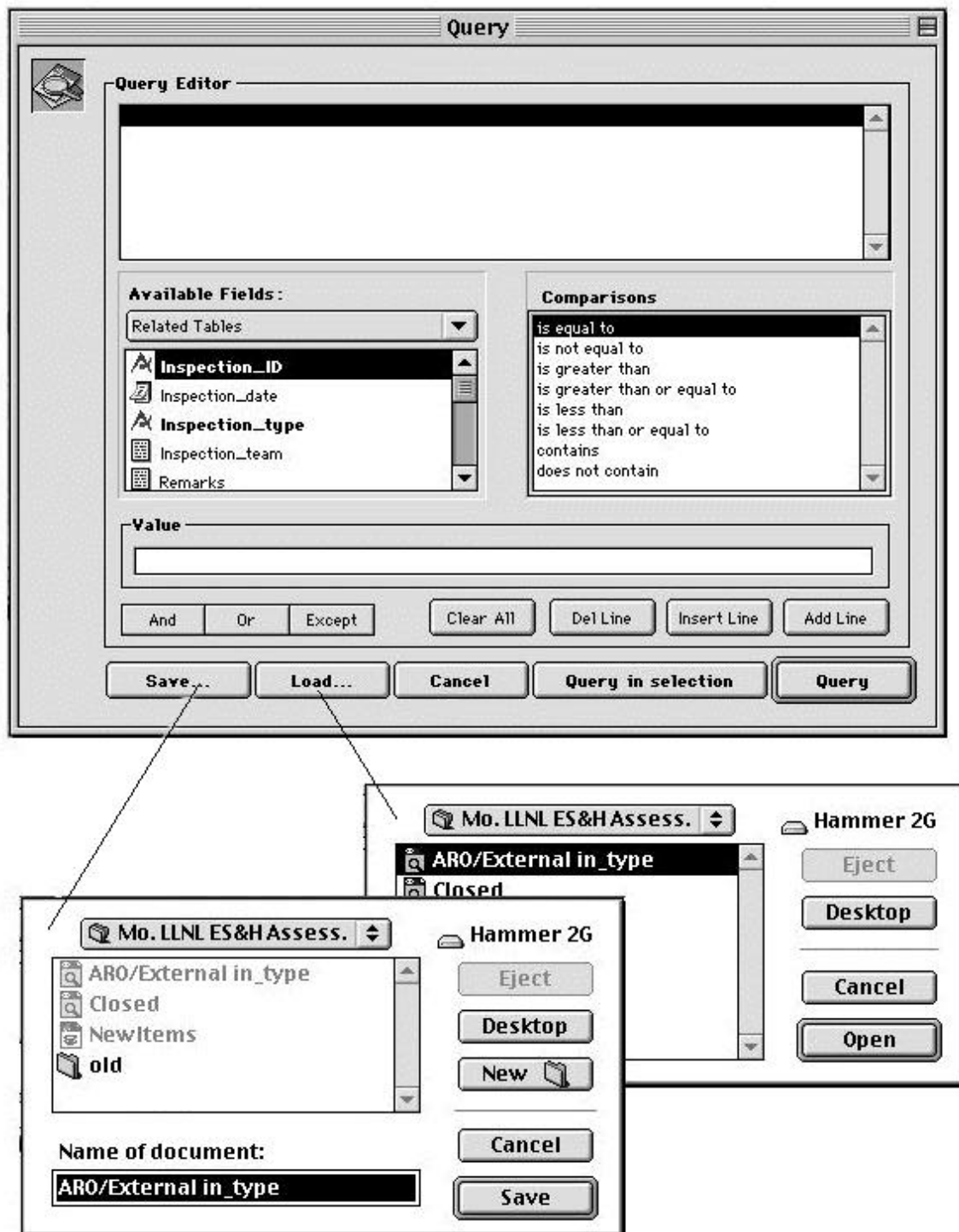
Use the procedure below to search for records.

Steps	Action
1.	<p>Choose Search from the Select menu.</p> <p>DefTrack displays the “Search Editor.”</p> 
2.	<p>Click on the field name you want to search in the “Available Fields” area.</p> 
3.	<p>Click on a comparison operator in the “Comparisons” dialog box.</p> 

How to Use Search, Continued

Steps	Action
4.	Enter (type) the value to search for in the “Value” area.
Notes	<p><i>In a text or alpha field, you can use the wild card character (@) at the end and/or at the beginning of the value to request a “Begins with” or “Ends with” search.</i></p> <p><i>If the field you selected is associated with a Choice list, DefTrack displays the list and prompts you to select a value. If the field is a Boolean field (yes/no), DefTrack displays a pair of radio buttons.</i></p>
5.	Click on one of the conjunction buttons (And , Or , Except) and repeat steps 2–4 to create a compound search condition.
Notes	<p><i>As you build the search condition, you can modify existing parts of the condition by clicking in the area to be changed and selecting or typing a new entry. You can move the search condition by choosing Clear from the Edit menu. In a compound search condition, you can move one line of the condition by choosing Cut from the Edit menu.</i></p>
Warning	<p><i>When you build a compound search, DefTrack evaluates the conditions in the order in which they appear in the Search Editor (i.e., from top to bottom). Therefore, there is no precedence among the conjunctions. Thus, if you have used more than two simple search conditions to build the compound condition, the order in which you enter search conditions can affect the results of the search.</i></p>
6.	<p>To save the search condition so that it can be used later,</p> <ul style="list-style-type: none"> • Click on the Save button. • Enter a file name in the create-file dialog box. Note that it is not necessary to save the search condition to perform the search. • Click on OK to perform the search, or click on Cancel to quit the Search Editor.
7.	<p>To Load the saved search condition,</p> <ul style="list-style-type: none"> • Click on the Load button. • Highlight the search template you want to load. • Click on OK, the search parameters will be placed in the search editor screen.

How to Use Search, Continued



NOTE: The Save function saves the search criteria, not the data. The Load function retrieves the saved search criteria.

How to Save/Restore the Current Selection

Background

Save Current Selection... saves the selection that has been found during a search or selections that have been made through **Show Subset**. The items selected will be retained for the duration of your session in DefTrack or until **Save Selection** is chosen again for this view. You can recall the save selection by using the **Restore Selection**, add to by using the **Add Selection To Saved Set**, **Omit Selection from Saved Set**, or **Omit Saved Set from Selection**.

Save Current Selection: Do the following to Save Current Selection:

Steps	Action
1.	Select "All Inspection Items, Inspections, Item Priorities, or Compliance Codelist" from the View menu, then perform a search to narrow your selection or highlight the items you want to perform the action on.
2.	Choose Save Current Selection from the Select menu. The selection is now saved to be reused.

Restore Selection: Do the following to Restore Selection:

Steps	Action
1.	Choose the Restore Selection from the Select menu. The items/inspections that were last saved using the Save Current Selection will be displayed.

Add Selection To Saved Set: Do the following to Add Selection To Saved Set:

Steps	Action
1.	Select "All Inspection Items, Inspections, Item Priorities, or Compliance Codelist" from the View menu, then perform a search to narrow your selection or highlight the items you want to perform the action on.
2.	Choose Show Subset from Select menu.
3.	Choose Add Selection To Saved Set , from the Select menu. The selection is now appended to the previously saved set.

How to Save/Restore the Current Selection, Continued.

**Omit Selection from
Saved Set:**

Do the following to **Omit Selection from Saved Set**:

Steps	Action
1.	Choose Restore Selection from the Select menu.
2.	Highlight the “All Inspection Items, Inspections, Item Priorities, or Compliance CodeList” that you want to omit from the saved set.
3.	Choose Show Subset from Select menu.
4.	Choose Omit Selection from Saved Set from the Select menu. The selection is now omitted from the saved set

**Omit Saved Set from
Selection:**

Do the following to **Omit Saved Set from Selection**:

Steps	Action
1.	Choose Omit Saved Set from Selection from the Select menu. This will omit the items in the saved set from the current selection.

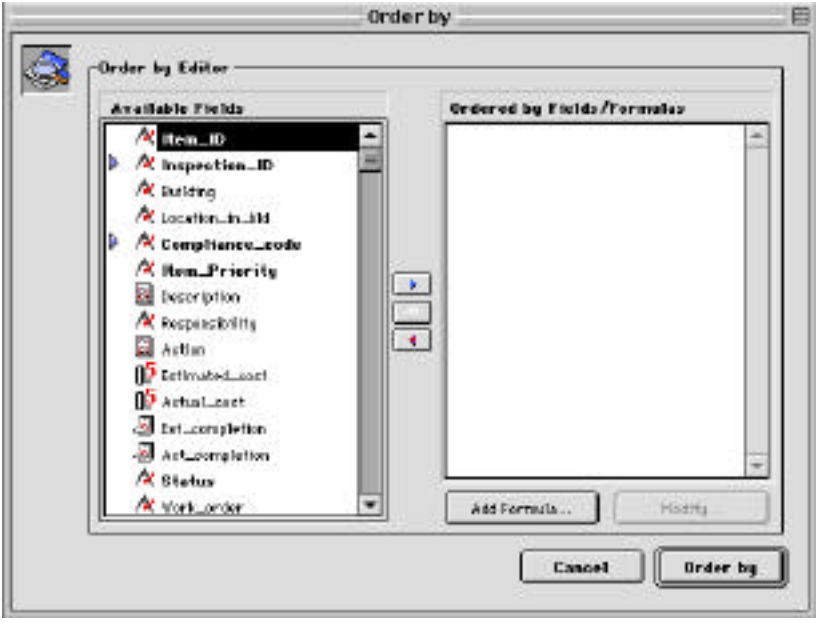
How to Sort the Current Selection

Background

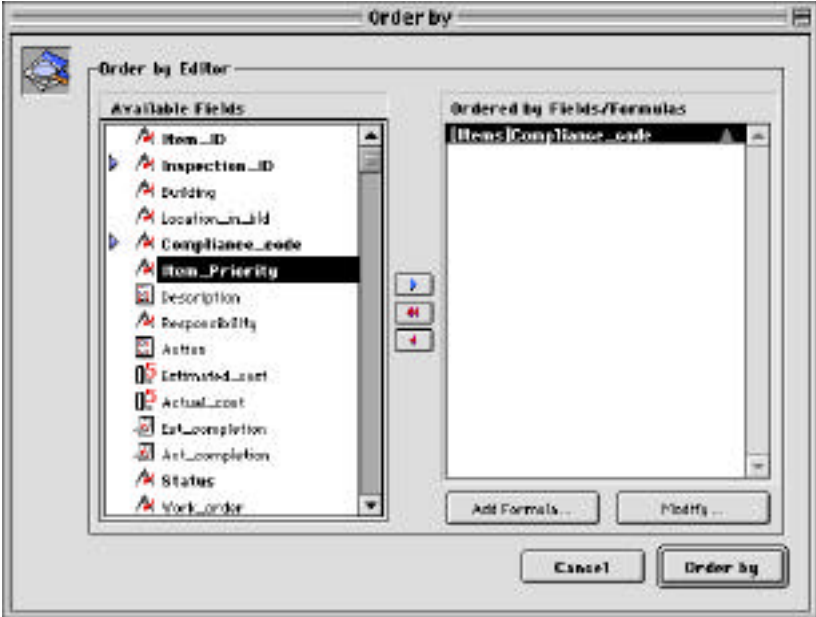
Sort... reorders the current selection of records according to the values in the database you specify. This sort is temporary and applies only to the current selection; it does not affect the order in which records are stored. **Sort...** is commonly used immediately after a search and before printing reports or labels.

Procedure

Do the following to sort a current selection:

Steps	Action
1.	Select the items to be sorted by either highlighting or searching.
2.	Choose Sort from the Select menu. DefTrack displays the Sort Editor. 
3.	Click on the name of the field you want to sort on.
4.	Click on the sort direction arrow at the end of the field name to switch between ascending (up) or descending (down) alphanumeric sort order.

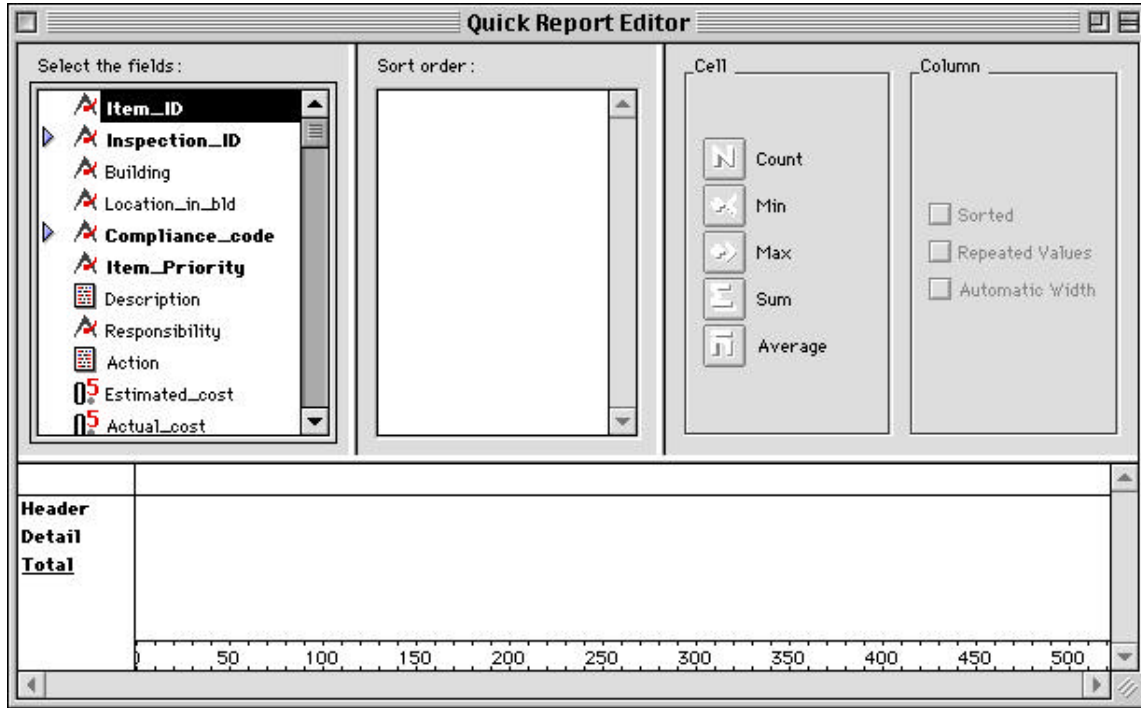
How to Sort the Current Selection, Continued

Steps	Action
5.	Repeat steps 3 and 4, if necessary, to add secondary sort levels to the list. For each sort level, you can specify ascending or descending order.
Notes	<p>The sort order shown below requests a list of items sorted by compliance code.</p> 
6.	Click on Order by
Notes	DefTrack sorts the current selection and displays the sorted list.

How to Create a Quick Report and Add Fields

Create a Quick Report

To make a Quick Report, choose **Quick Report** from the **Report** menu, the following screen will appear:



Add fields

Do the following to add fields to the Quick Report:

Steps	Action
1.	If you want to see the related fields, click on the triangles in the Field Selection box to display the related field.
Notes	<i>Fields from related files may be added to the report, provided the relationship is automatic.</i>
2.	Drag the name of the field from the Field Selection box into the column where the field is to be added and release the mouse button.
Notes	<i>By default, DefTrack prints the field name(s) as column heads at the top of each page in the Quick Report.</i>

How to Insert, Delete, and Size Columns

Insert columns

Do the following to insert blank columns:

Steps	Action
1.	Select a new blank column location.
2.	Choose Add Column from the Edit menu.
Notes	<i>DefTrack inserts a blank column to the left of the column selected. A field may then be assigned by dragging a field name into the empty column.</i>


Delete columns

When fields are specified for the Quick Report, columns can be removed and placed elsewhere, or be deleted. Do the following to delete columns:

Steps	Action
1.	Select the column(s) to be deleted.
Notes	<i>The entire column must be selected (highlighted).</i>
2.	Choose Delete Column from the Edit menu.

Size columns

Do the following to size/resize columns:

Steps	Action
1.	Highlight the column(s) to be resized.
2.	Deselect the Automatic Width option.
3.	Move the pointer over the column indicator in the column head to change the pointer into a column-width cursor, as shown below. 
4.	Hold down the mouse button, and drag the column indicator to the left or right to size the column.

How to Insert, Delete, and Size columns, Continued

Notes: *The Quick Report editor sizes columns automatically. Each column size is based on the maximum length of data displayed in the column and the length of any labels typed in the column. The Quick Report editor sizes columns at the time the report is printed.*

*To view the widths of each column, preview the report on the screen. Because the **Automatic Width** changes the width of a column, based on the maximum width of data in the records being printed, selecting different records can change the size of the columns.*

*A column can be resized manually after the **Automatic Width** option is turned off. When a column is set manually, text in the column wraps *with the* specified area.*

How to Specify/Change a Field From a Sort Order

Specify/ change a sort order

Do the following to specify or change a sort order:

Steps	Action
1.	Drag the field to be sorted to the Sort Order box or highlight the field column to be sorted and click the sort check box in the Column box .
Notes	<i>When the mouse button is released, DefTrack displays the name of the field in the Sort box. To the right of the name is a small arrow, indicating an ascending or descending order.</i>
2.	Click on the sort direction to sort the column in the descending or ascending order.
3.	Perform step 1 again to specify secondary sort levels, if necessary.
Notes	<i>When specifying multiple sort levels, DefTrack sorts the records on the first field in the Sort field list, then on other fields in the order in which they appear in the list. For example, "Building" could be specified as the primary Sort field, and "Location_in_bld" as the secondary Sort field.</i>

Undo a sort order

To undo a sort, highlight the column to be sorted and uncheck the sort box.

How to Insert Break Levels

Background

In a Quick Report, break levels are set to separate or “break” records into groups according to values in one or more sort fields. At each break level, a “break” is printed. Summary calculations can be printed in the “break” area. The summary calculations—sum, average, minimum, maximum, and count—are computed for each group of records.

Break levels are determined by the sort levels and “break” rows. For example, if DefTrack is instructed to sort records by Item ID and Status and to create a “break” row, a break is inserted between each group of records that have the same Item ID and Status. See the example below.

After a “break” row is added to the Quick Report, summary calculations can be requested on each break. For example, insert a summary calculation in the “break” row to display subtotals for Item ID and Status.

Example

The screenshot shows the 'Quick Report Editor' window. It has three main sections: 'Select the fields:', 'Sort order:', and 'Cell/Column' settings. Below these is a preview of the report layout.

Select the fields:

- Inspection_ID
- Inspection_date
- Inspection_type
- Inspection_team
- Remarks
- Disposition
- Inspection_name
- SpecialDate
- SpecialName
- Comments
- SpecialUser

Sort order:

- [Inspections]Inspe...
- [Inspections]Inspector

Cell/Column settings:

- Count
- Min
- Max
- Sum
- Average
- ☒ Sorted
- ☐ Repeated Values
- ☒ Automatic Width

Report Preview:

	[Inspections]Inspection_ID	[Inspections]Inspection_date
Header	Inspection_ID	Inspection_date
Detail		
Break 2		Count
Break 1		Count
Total	Grand Total	Count

How to Insert Break Levels, Continued

Insert break levels

Do the following to insert break levels:

Steps	Action
1.	Select the “Totals” (T) row.
2.	Choose Add Break from the Edit menu. DefTrack adds a “break” row.
3.	Select an existing “break” row and choose Add Break from the Edit menu to add other “break” rows, if necessary.
Notes	<i>DefTrack adds a sequential number to each break label in the row label bar (e.g., B1, B2, B3).</i>
4.	Drag the name of the Sort field in the Sort box to the required column to change the order of the sort, if necessary.
Notes	<i>The new sort field assumes the level of the previous sort field.</i>

How to Add Headers, Footers, Page Numbers, Time, and Date

Add headers/footers

Do the following to add headers and footers:

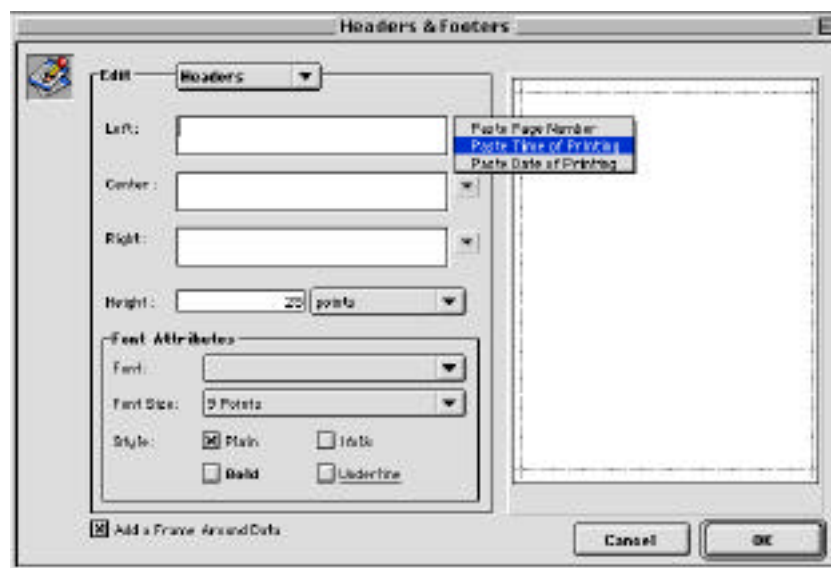
Steps	Action
1.	Choose Headers and Footers from the File menu.
2.	Select Header from the drop down menu box to input the header information.
3.	Select Footer from the drop down menu box to input the footer information.
4.	Select one of the six header and footer entries and type the text for the header and footer.
5.	Choose the appropriate entries from the Font Attributes to change the fonts, size, justification, and style of the header and footer if necessary.

Add page numbers, time, and date

To add page numbers, time, or date to the Quick report, select the appropriate entries from the drop down menu to the right of the Left, Right, or Center justification boxes.

Or type in these codes:

- #P adds a sequential page number.
- #H adds the time of printing.
- #D adds the date of printing.



How to Accept a Page Setup and Print a Quick Report

Accept page setup

Click on **OK** to accept the page setup if it is satisfactory and to return to the Quick Report editor.

Print Quick Report

Do the following to print a Quick Report:

Steps	Action
1.	Choose Print from the File menu, or click on the Print button at the bottom of the screen.
2.	Click on OK , then follow the standard DefTrack procedure for printing and previewing the report.

How to Save and Load a Quick Report Template

Helpful hints

A Quick Report template includes specifications but no data. It may be saved as a file to be opened from the Quick Report editor. You can maintain a library of Quick Report templates to use for different purposes.

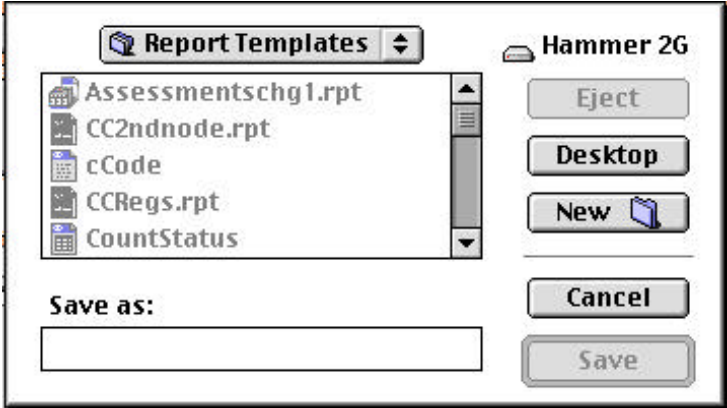
If you opened a particular template and did not save it, that template will be displayed the next time you open the Quick Report editor, provided you did not quit the application.

If you opened a particular template and did not save it, that template will be displayed the next time you open the Quick Report editor, provided you did not quit the application.

Create a folder to store templates; make the file names meaningful.

To save

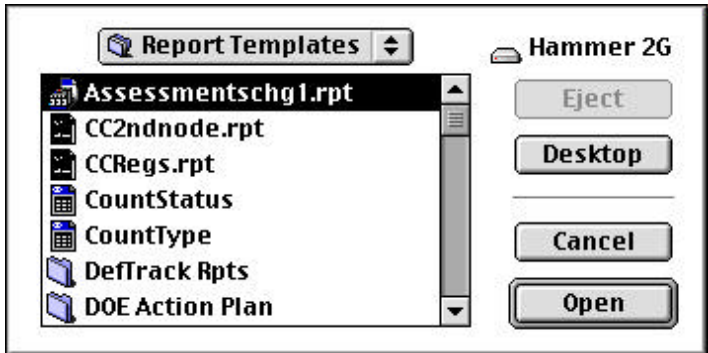
Do the following to save a Quick Report template:

Steps	Action
1.	<p>Choose Save from the File menu. DefTrack displays a create-file dialog box.</p> 
2.	<p>Enter a file name for the Quick Report and click on Save.</p>
Notes	<p>DefTrack saves the report as a file that can be opened with the Quick Report editor.</p> <p>Saving a report previously saved, replaces the old report.</p> <p>When the Quick Report editor is open, a saved template may be loaded and used to print a new report. The same Quick Report template can be used repeatedly to print a different selection of records.</p>

How to Save and Load a Quick Report Template, Continued

To load

Do the following to load a Quick Report template:

Steps	Action
1.	<p>Choose Open from the File menu. DefTrack displays an open-file dialog box, which includes a list of available Quick Report templates or folders.</p> 
2.	Open the folder where the reports are stored.
3.	Select a file from the list and click on Open .
Notes	<i>DefTrack replaces the current report template with the template opened (selected).</i>

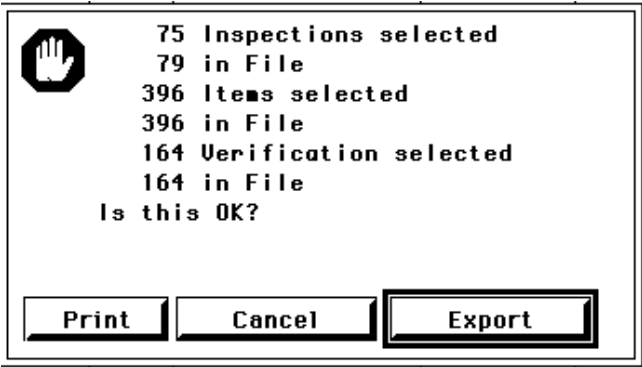
How to Export Data

There are a number of menu choices to export data out of DefTrack (Item Transfer Export, Export to Directorate, ARO Only Export, ARO Action Plan Export, ARO Only Export Resend, ARO Export Synchronization, and Export Comments). Not all export choices will be active for all User type passwords; i.e., [Export Comments](#) can only be used by the Special Guest and Administrator/Designer password to export items out of DefTrack.

It is important to select the right Export menu choice when exporting information out of DefTrack in order for the correct Header information to be placed on the file.

The exported item files from any of the export commands will be placed in the same folder as your DefTrack application.

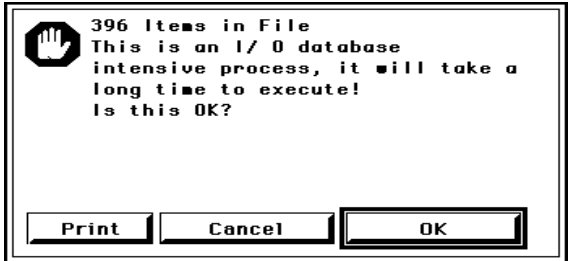
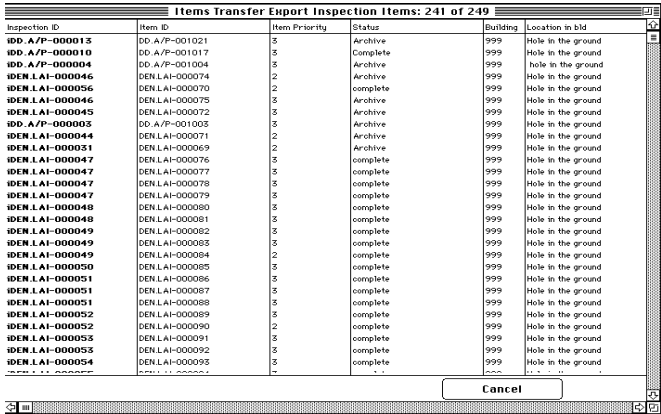
Regular Export

Steps	Action
1.	<p>For a regular export from the (Items, Inspections, Verifications, Compliance Code, or Priority) view, select Export from the file menu.</p> <p>The following window will appear:</p>  <p>Click Export</p> <p>Items 1, 2, and 3 will be created</p>
Notes	<p>If you want a copy of the Warning box with the Export statistics – click the Print button.</p>

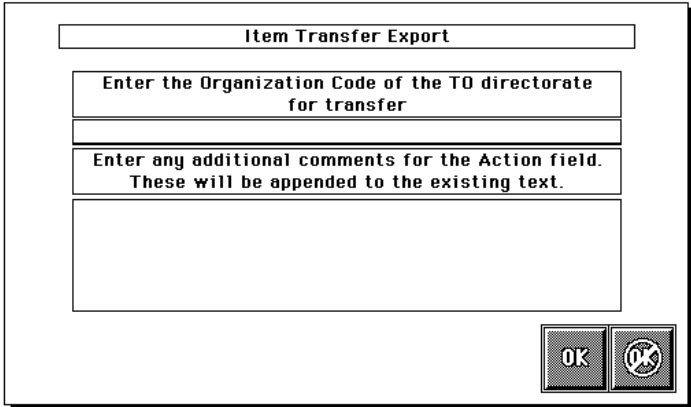




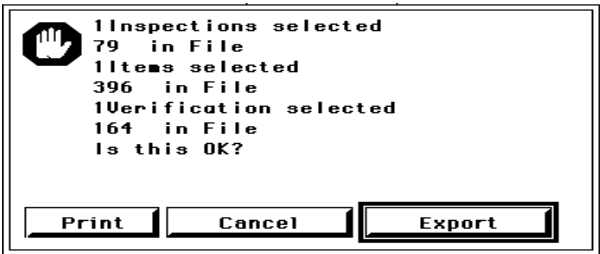
How to Export Data, Continued

Items Transfer Export

Items Transfer Export is used to transfer items from one Directorate Org_Code to another i.e.. Plant Operations PO-123456 to Lasers LA-123456.

Steps	Action
1.	<p>From the Splash screen, select Item Transfer Export... from the file menu.</p> <p>The following window will appear:</p>  <p>Click OK</p>  <p>This window will display every item in the datafile except for the ones with a status of Transferred.</p>
2.	<p>Highlight or search for the items that are to be transferred.</p> <p>Once the items have been chosen, choose Show Subset from the Select Menu.</p>
3.	<p>Choose Transfer Items from the Enter Menu to transfer the items chosen or Cancel to cancel the process.</p>
Notes	<p>If you want to print a copy of the items being transferred, choose Print Selection from the File Menu before you choose Transfer Items.</p>

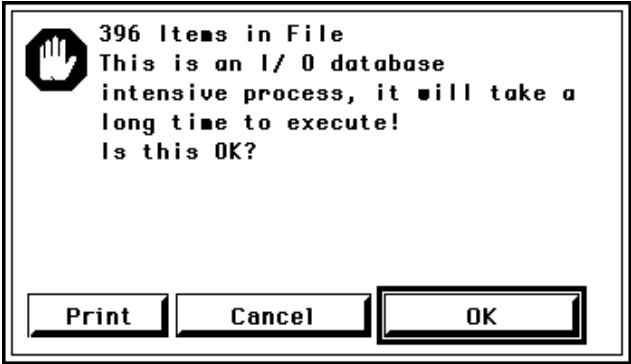
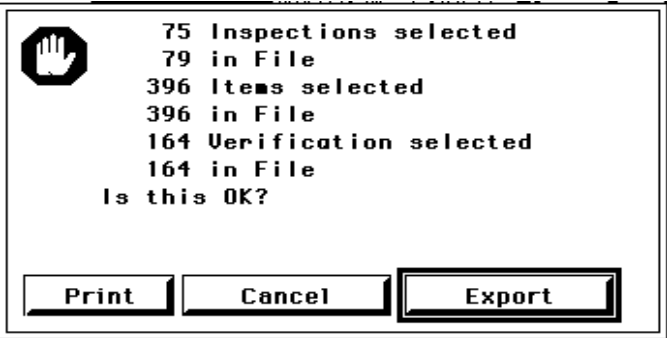
How to Export Data, Continued

Steps	Action
4.	 <p>Under the "Enter the Organization Code of the To directorate for transfer" enter the Org_code of the directorate that you are transferring to.</p> <p>Notes Tab to the next field and add any additional information after the "transfer to" information.</p> <p><i>Example: If your Org_code is EE and the directorate that you were transferring to Org_code is TT then enter TT in the "Enter the Organization Code....." box.</i></p>
5.	  <p>Click  when done or  to cancel.</p>
6	 <p>The above dialog box will appear indicating the number of items being transfer. If this is correct, click on Export or Cancel to quit the processed.</p> <p>Org_code TransferItems1,2, and 3 will be created and you will be returned to the splash screen.</p> <p>Notes <i>If you want a copy of the Warning box with the Export statistics – click the Print button.</i></p>

How to Export Data, Continued

Export to Directorate

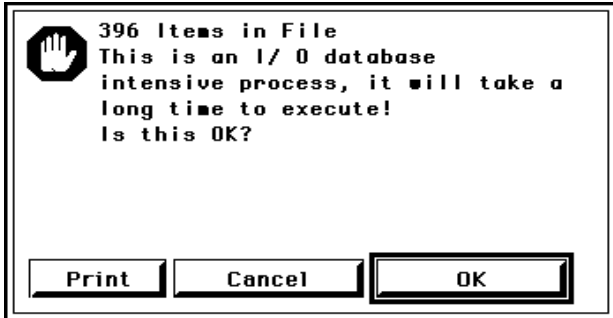
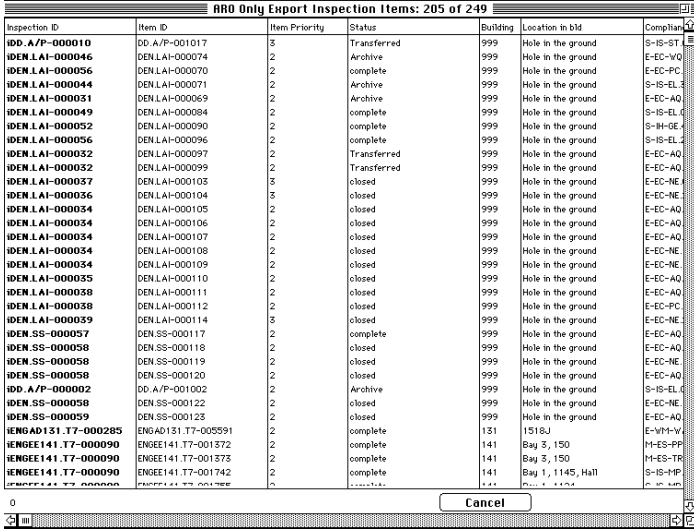
Export to Directorate is used by the Data Entry person to export all the data in their DefTrack data file to the Administrator for an ARO Roll-up.

Steps	Data Entry User Action
1.	From the splash screen, select Export to Directorate...from the file menu.
2.	<p>Verify the information in the message box. If correct click on OK.</p> 
3.	<p>The Following dialog box will appear. If OK click on Export otherwise click on Cancel.</p> 
3.	Deliver created files (Dir.item1, 2, and 3) to your Administrator.


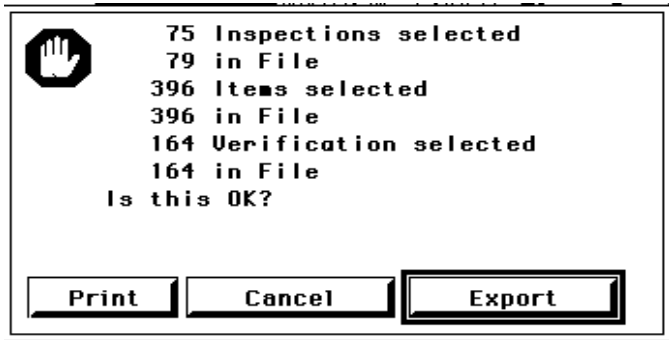
How to Export Data, Continued.

ARO Only Export

Do the following to export data to the Assurance Review Office for the ARO monthly roll-up:

Steps	Administrator Action Only
1.	If you've imported information from your users, go to step 2. If not, see section on How to Import Data.
2.	From the splash screen, select ARO Only Export...from the file menu.
3.	<p>Verify the information in the message box, if correct click on OK.</p> 
4.	 <p>Select Create Roll Up Files, from the Enter Menu. A MADS check will be performed on the items, if they pass the following dialog box will appear:</p>

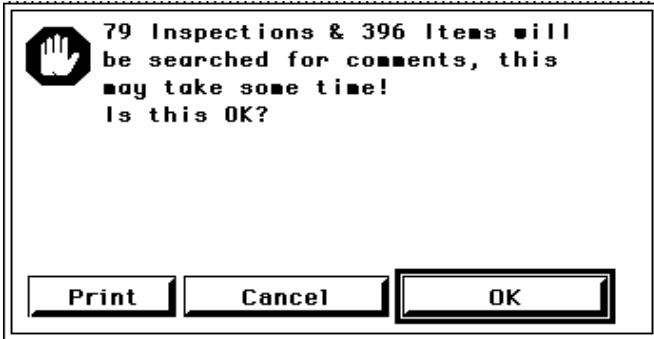
How to Export Data, Continued.

Steps	Action
4.	<div data-bbox="646 369 1256 701">  </div> <p>Click on OK and the following dialog box will appear.</p> <div data-bbox="617 798 1282 1134">  </div> <p>If the items did not pass the MADS check, you will be put in an Items Error View to make corrections. After you have accepted the correction you will have to start from step 2 again.</p> <p>Notes <i>Org_code and the date of the roll-up file has been placed in front of the Item numbers; i.e., DD.mm/dd/yyItem1.</i></p> <p><i>A MADS error file will be placed in the same folder as your DefTrack application. You may open this file with Simple text or any word processing program to read a summary of the errors.</i></p>
5.	Place the files created (Org_code.dateitem 1, 2, and 3 files) on the ARO DefTrack Administrators server.

How to Export Data, Continued.

Export Comments

Do the following to export your comments data out of DefTrack:

Steps	Special Guest and Administrator Action Only
1.	From the splash screen go to the Enter menu and choose Export Comments...
2.	<div data-bbox="636 522 1286 858"></div> <p>The above dialog box will appear. If you want to continue, click OK otherwise click Cancel.</p> <p>When OK is chosen, a special file will be made containing all the special comments you entered in your personal data file. The special file has the file name Special prefixed with a date i.e.. Special.mm/dd/yy.</p>

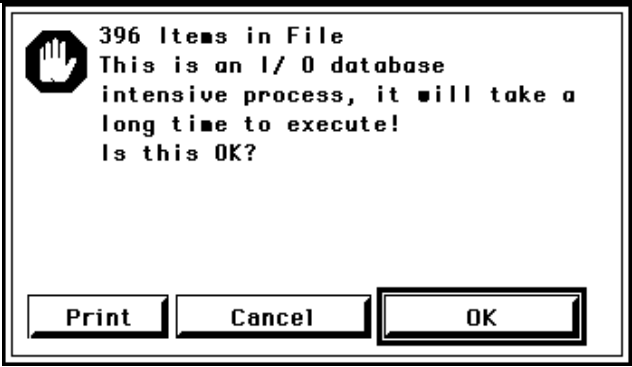
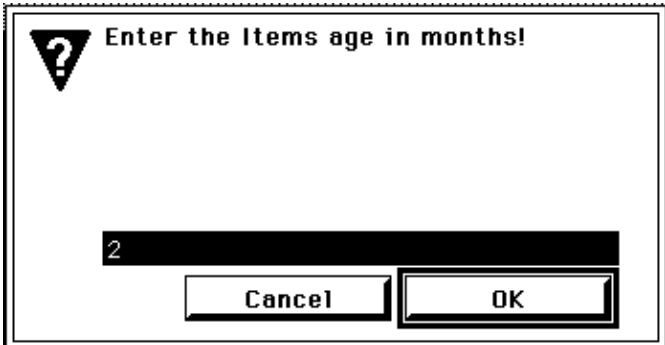
Warning

You must export your special comments from your data file before you delete it and before you load a new DefTrack data file. If you don't you will lose all the special comments that you've entered.


How to Export Data, Continued.

Archive

Do the following to Archive closed data in DefTrack:

Steps	Data Entry User and Administrator Action Only
1.	From the splash screen select Archive.. from the File menu.
2.	 <p>A dialog box will appear indicating the number of records that will be searched. If this is correct, click OK.</p>
3.	<p>DefTrack will be searching for items with a status of either "Closed" or "Transferred". You will be presented with a dialog box , at the end of the search, that says, "Enter the item age in months". The default will come up as 2.</p>  <p>If a 2 is left in the dialog box, DefTrack will search for all items that have had a status of "Closed" or "Transferred" for at least 2 months. You may put a number in the dialog box that is greater than 2 and DefTrack will search for those items that have been "Closed" or "Transferred" for however many months you specify. If you enter a 0 or 1 in the dialog box, DefTrack will use the a default age of 2.</p> <p>Click OK if you are satisfied with the "age" time period.</p> <p>The following window will appear at the completion of the search process.</p>

How to Export Data, Continued.

Steps	Action																																																																																																																																																																														
4.	<div><div><div>Archive Inspection Items: 28 of 249</div><table><thead><tr><th>Inspection ID</th><th>Item ID</th><th>Item Priority</th><th>Status</th><th>Building</th><th>Location in bld</th></tr></thead><tbody><tr><td>IDEN.LAI-000045</td><td>DEN.LAI-000072</td><td>3</td><td>Archive</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000044</td><td>DEN.LAI-000071</td><td>2</td><td>Archive</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000051</td><td>DEN.LAI-000069</td><td>2</td><td>Archive</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000052</td><td>DEN.LAI-000097</td><td>2</td><td>Transferred</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000052</td><td>DEN.LAI-000098</td><td>1</td><td>Transferred</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000052</td><td>DEN.LAI-000099</td><td>2</td><td>Transferred</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000052</td><td>DEN.LAI-000100</td><td>1</td><td>Transferred</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000052</td><td>DEN.LAI-000101</td><td>1</td><td>Transferred</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000053</td><td>DEN.LAI-000102</td><td>1</td><td>Transferred</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000057</td><td>DEN.LAI-000103</td><td>3</td><td>closed</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000056</td><td>DEN.LAI-000104</td><td>3</td><td>closed</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000054</td><td>DEN.LAI-000105</td><td>2</td><td>closed</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000054</td><td>DEN.LAI-000106</td><td>2</td><td>closed</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000054</td><td>DEN.LAI-000107</td><td>2</td><td>closed</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000054</td><td>DEN.LAI-000108</td><td>2</td><td>closed</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000054</td><td>DEN.LAI-000109</td><td>2</td><td>closed</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000055</td><td>DEN.LAI-000110</td><td>2</td><td>closed</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000058</td><td>DEN.LAI-000111</td><td>2</td><td>closed</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000058</td><td>DEN.LAI-000112</td><td>2</td><td>closed</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000053</td><td>DEN.LAI-000113</td><td>1</td><td>Transferred</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000059</td><td>DEN.LAI-000114</td><td>3</td><td>closed</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000040</td><td>DEN.LAI-000115</td><td>3</td><td>closed</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.LAI-000040</td><td>DEN.LAI-000116</td><td>3</td><td>closed</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.SS-000058</td><td>DEN.SS-000118</td><td>2</td><td>closed</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.SS-000058</td><td>DEN.SS-000119</td><td>2</td><td>closed</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.SS-000058</td><td>DEN.SS-000120</td><td>2</td><td>closed</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.SS-000058</td><td>DEN.SS-000122</td><td>2</td><td>closed</td><td>999</td><td>Hole in the grou</td></tr><tr><td>IDEN.SS-000059</td><td>DEN.SS-000123</td><td>2</td><td>closed</td><td>999</td><td>Hole in the grou</td></tr></tbody></table><div>Cancel</div></div><p>The above view indicates all the items that can be archived to your data file. You now have a choice to print the items shown, choose a subset to be archived, or archive all the items shown.</p><p>To print Items choose the Print Selection from the File Menu.</p><p>To choose a subset, highlight the subset of items and click on the Show Subset, then choose Archive items from the Enter Menu.</p><p>To archive all items shown, choose Archive items from the Enter Menu.</p></div>	Inspection ID	Item ID	Item Priority	Status	Building	Location in bld	IDEN.LAI-000045	DEN.LAI-000072	3	Archive	999	Hole in the grou	IDEN.LAI-000044	DEN.LAI-000071	2	Archive	999	Hole in the grou	IDEN.LAI-000051	DEN.LAI-000069	2	Archive	999	Hole in the grou	IDEN.LAI-000052	DEN.LAI-000097	2	Transferred	999	Hole in the grou	IDEN.LAI-000052	DEN.LAI-000098	1	Transferred	999	Hole in the grou	IDEN.LAI-000052	DEN.LAI-000099	2	Transferred	999	Hole in the grou	IDEN.LAI-000052	DEN.LAI-000100	1	Transferred	999	Hole in the grou	IDEN.LAI-000052	DEN.LAI-000101	1	Transferred	999	Hole in the grou	IDEN.LAI-000053	DEN.LAI-000102	1	Transferred	999	Hole in the grou	IDEN.LAI-000057	DEN.LAI-000103	3	closed	999	Hole in the grou	IDEN.LAI-000056	DEN.LAI-000104	3	closed	999	Hole in the grou	IDEN.LAI-000054	DEN.LAI-000105	2	closed	999	Hole in the grou	IDEN.LAI-000054	DEN.LAI-000106	2	closed	999	Hole in the grou	IDEN.LAI-000054	DEN.LAI-000107	2	closed	999	Hole in the grou	IDEN.LAI-000054	DEN.LAI-000108	2	closed	999	Hole in the grou	IDEN.LAI-000054	DEN.LAI-000109	2	closed	999	Hole in the grou	IDEN.LAI-000055	DEN.LAI-000110	2	closed	999	Hole in the grou	IDEN.LAI-000058	DEN.LAI-000111	2	closed	999	Hole in the grou	IDEN.LAI-000058	DEN.LAI-000112	2	closed	999	Hole in the grou	IDEN.LAI-000053	DEN.LAI-000113	1	Transferred	999	Hole in the grou	IDEN.LAI-000059	DEN.LAI-000114	3	closed	999	Hole in the grou	IDEN.LAI-000040	DEN.LAI-000115	3	closed	999	Hole in the grou	IDEN.LAI-000040	DEN.LAI-000116	3	closed	999	Hole in the grou	IDEN.SS-000058	DEN.SS-000118	2	closed	999	Hole in the grou	IDEN.SS-000058	DEN.SS-000119	2	closed	999	Hole in the grou	IDEN.SS-000058	DEN.SS-000120	2	closed	999	Hole in the grou	IDEN.SS-000058	DEN.SS-000122	2	closed	999	Hole in the grou	IDEN.SS-000059	DEN.SS-000123	2	closed	999	Hole in the grou
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IDEN.SS-000059	DEN.SS-000123	2	closed	999	Hole in the grou																																																																																																																																																																										
5.	<div><div><div><div></div><div>75 Inspections selected 79 in File 396 Items selected 396 in File 164 Verification selected 164 in File Is this OK?</div></div><div><div>Print</div><div>Cancel</div><div>Export</div></div></div></div> <p>If the message in the above dialog box is correct click on Export, otherwise click on Cancel.</p>																																																																																																																																																																														

How to Import Data


There are a number of menu choices to import data into the DefTrack.data file (Import, Item Transfer Import, Import Comments, and ARO Import). Not all import choices will be active for all User type passwords; i.e., **ARO Import** can only be used by the Assurance Review Office password to import items that have been exported using **ARO Only Export**.

It is important to select the right Import menu choice when importing information into your Data file. The various Import menu choices look for specific header information in your Export files. If the header information is incorrect, the import will not take place and an error message will appear.

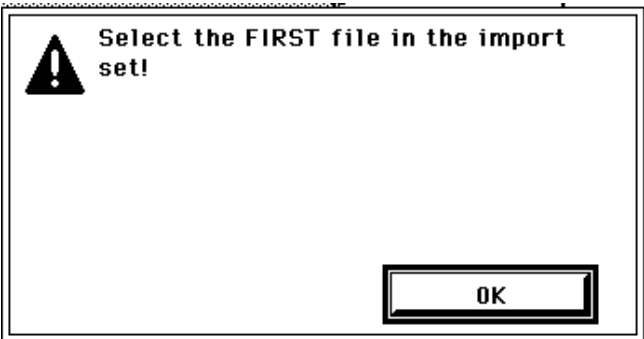
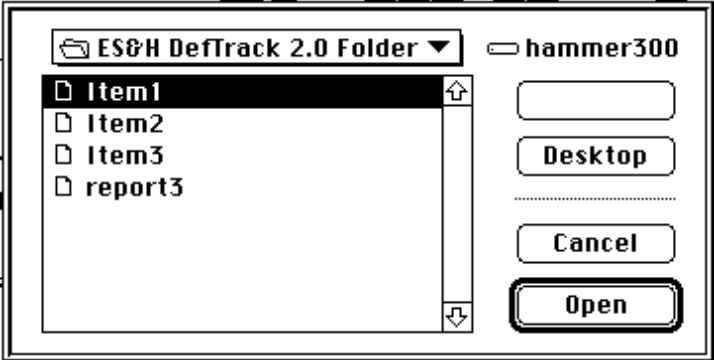
Import

Use this Import choice to Import files that were Exported using these menu export choices [Export to Directorate](#), [Export](#), and [Archive](#) export items.

Notes: Make sure you are in the right view before you import the data example: if you are importing the compliance codes, you should be in the compliance code view.

Steps	Action
1.	<p>From the splash screen, select Import to import data from the file menu.</p> <p>The following window will appear:</p> <div data-bbox="652 1209 1268 1530"><p>Importing records may overlay existing records in your database, to avoid the possibility of database corruption, create a back up copy of your data file!</p><p><input type="button" value="Print"/> <input type="button" value="Cancel"/> <input type="button" value="Import"/></p></div> <p>Click Import</p>

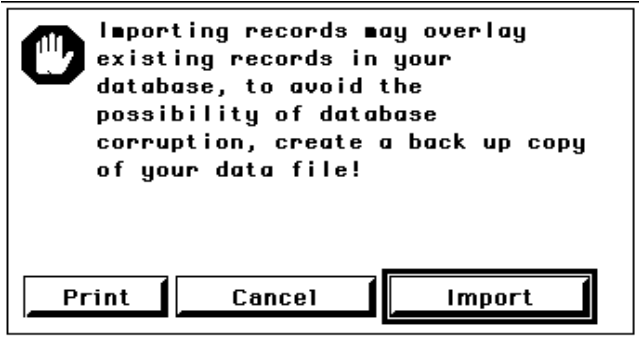
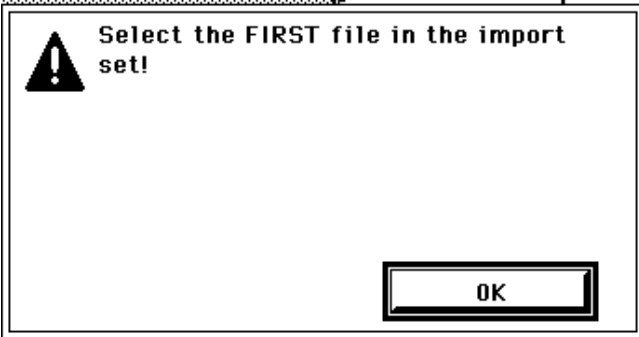
How to Import Data, Continued

Steps	Action
2.	<p>The following window will appear:</p>  <p>Click OK</p>
3.	<p>A similar Dialog box will appear:</p>  <p>Select Item1 and click on Open to import data. All Items 1, 2, and 3 will be imported into DefTrack.</p>

How to Import Data, Continued

Item Transfer Import

Use this Import choice to Import files that were Exported using the **Item Transfer Export** menu choice.

Steps	Action
1.	<p>From the splash screen, select Item Transfer Import to import data from the file menu.</p> <p>The following window will appear:</p> <div data-bbox="646 577 1281 911"><p>Importing records may overlay existing records in your database, to avoid the possibility of database corruption, create a back up copy of your data file!</p><p>Print Cancel Import</p></div> <p>Click Import.</p> <p>The following window will appear:</p> <div data-bbox="646 1045 1281 1379"><p>Select the FIRST file in the import set!</p><p>OK</p></div> <p>Click OK</p>

How to Import Data, Continued

Steps	Action
2.	<div data-bbox="625 367 1295 709"> </div> <p>Highlight the org_code.TransferItem that you want to import into your data file and click Open.</p> <p>Notes <i>You do not have to highlight all three transfer Item files, just one will do.</i></p>
3.	<div data-bbox="706 907 1218 1318"> </div> <p>Select the organization code that you want your files named on import by clicking the radio buttons. The first radio button is the organization code that the sender named the files, the second button is the organization code in your machine, and the third is left blank for you to input an organization code of your choice.</p> <p>If you want the appended transfer information imported into the action field, leave the Auto Append to Action Field box checked. If you do not want the transfer information to be appended to the action field, uncheck the Auto Append to Action Field box.</p> <p>Once you've selected the organization code, click Import or Cancel to end the process.</p>

How to Import Data, Continued

Steps	Action						
4.	<div><div><div><div>Import File Header Information</div><div>The following header(s) appear on the import file(s) respectively. If this is reasonable please click OK. If this is NOT, click Cancel to bypass this import.</div><table><thead><tr><th>1a.Transfer.Item1</th><th>1a.Transfer.Item2</th><th>1a.Transfer.Item3</th></tr></thead><tbody><tr><td>Records from xFr: Inspections Version: 4.0 Alpha 9/1/94 Export Date: 9/30/94 Export Time: 16:06:27 Record Count: 1</td><td>Records from xFr: Items Version: 4.0 Alpha 9/1/94 Export Date: 9/30/94 Export Time: 16:06:27 Record Count: 1</td><td>Records from xFr: Verification Version: 4.0 Alpha 9/1/94 Export Date: 9/30/94 Export Time: 16:06:27 Record Count: 1</td></tr></tbody></table><div><div>Cancel</div><div>OK</div></div></div></div><div><p>Look over the dialog box. If everything meets with your approval click OK or Cancel to end the process</p><p>You will be returned to the splash screen at the end of the importing process.</p></div></div>	1a.Transfer.Item1	1a.Transfer.Item2	1a.Transfer.Item3	Records from xFr: Inspections Version: 4.0 Alpha 9/1/94 Export Date: 9/30/94 Export Time: 16:06:27 Record Count: 1	Records from xFr: Items Version: 4.0 Alpha 9/1/94 Export Date: 9/30/94 Export Time: 16:06:27 Record Count: 1	Records from xFr: Verification Version: 4.0 Alpha 9/1/94 Export Date: 9/30/94 Export Time: 16:06:27 Record Count: 1
1a.Transfer.Item1	1a.Transfer.Item2	1a.Transfer.Item3					
Records from xFr: Inspections Version: 4.0 Alpha 9/1/94 Export Date: 9/30/94 Export Time: 16:06:27 Record Count: 1	Records from xFr: Items Version: 4.0 Alpha 9/1/94 Export Date: 9/30/94 Export Time: 16:06:27 Record Count: 1	Records from xFr: Verification Version: 4.0 Alpha 9/1/94 Export Date: 9/30/94 Export Time: 16:06:27 Record Count: 1					

How to Import Data, Continued

Import Comments

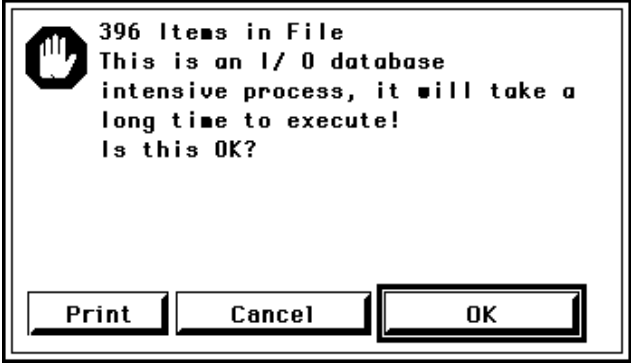
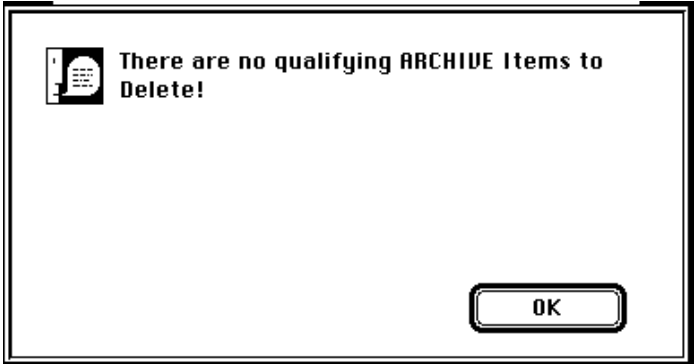
This import procedure is used to import items that have been exported using [Export Comments](#). Both the Import/Export Comments choices can only be accessed by the Special Guest, Administrator and Designer only passwords.

Steps	Action for Special Guest, Admin., and Designer Only
1.	From the Splash screen choose Import Comments.. from the Enter Menu.
2.	<div data-bbox="646 600 1284 936"> <p>A warning dialog box with a black triangle icon containing an exclamation mark. The text reads: "Select the FIRST file in the import set!". There is an "OK" button at the bottom right.</p> </div> <p>Click OK.</p>
3.	<div data-bbox="643 1037 1281 1360"> <p>A file selection dialog box. At the top, there is a dropdown menu showing "Def Track Data". Below it is a list of files: "7/21/93.Special" (selected), "dd.bb.TransferItem1", "dd.bb.TransferItem2", "dd.bb.TransferItem3", "Item1", "Item2", "Item3", and "New Data Files". To the right of the list are buttons for "Dennis", "Desktop", "Cancel", and "Open".</p> </div> <p>Choose the correct Special file and click Open. The import procedure will begin and you will be returned to the splash screen at the end of the process.</p> <p>Cancel will stop the process and return you to the splash screen.</p>

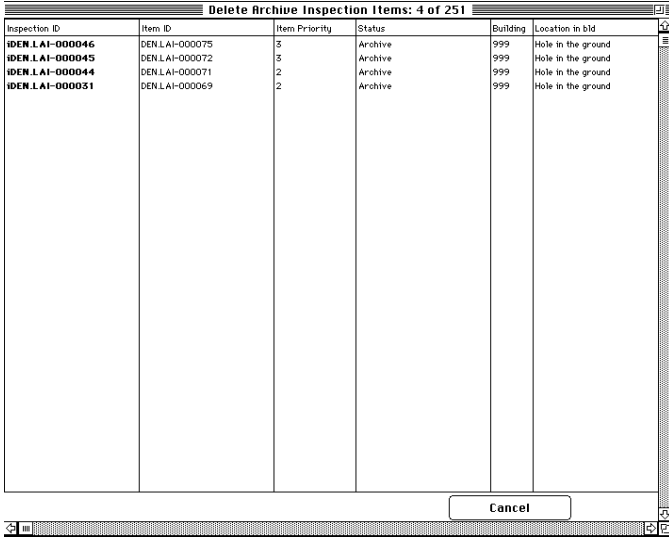
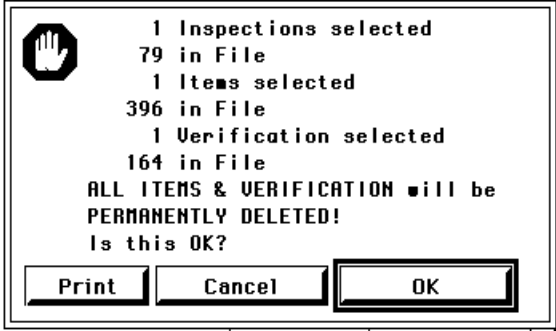
How to Archive Delete

Archive Delete




Do the following to delete Archive data in DefTrack:

Steps	Action
1.	From the splash screen select Archive Delete.. from the File menu.
2.	 <p>A dialog box will appear indicating the number of records that will be searched. If this is correct, click OK.</p>
3.	<p>DefTrack will be searching for items with a status of Archive that have been archived for at least 2 months. You will be presented with either a dialog box, at the end of the search, that says, "There are no qualifying Archive items to Delete!"</p>  <p>Click OK.</p> <p>Or the following window will appear at the completion of the search process.</p>

How to Archive Delete, Continued.

Steps	Action
4.	 <p>The above view indicates all the Archive items that can be deleted from your data file. You now have a choice to print the items shown, choose a subset to be deleted, or delete all the items shown.</p> <p>To print Items select the Print Selection from the File menu.</p> <p>To choose a subset, highlight the subset of items and click on the Show Subset, then choose Delete Archive Items from the Enter menu.</p> <p>To delete all items shown, choose Delete Archive Items from the Enter menu.</p>
5.	 <p>If the message in the above dialog box is correct click on OK, otherwise click on Cancel.</p>


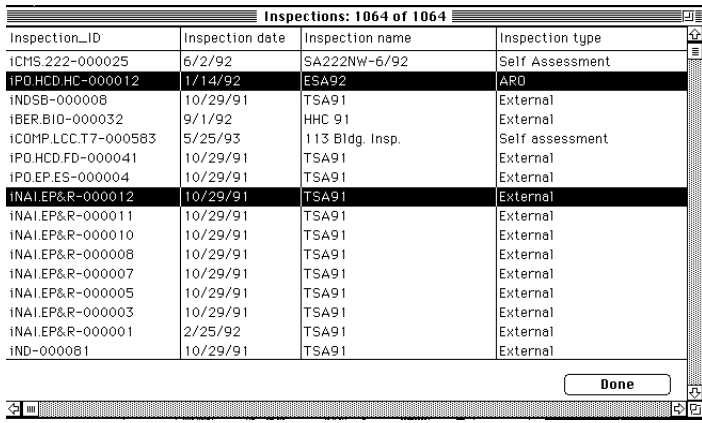
How to Archive Delete, Continued.

Steps	Action
6.	<p>When you click on OK, the items selected will be deleted from the database and 3 items files of deleted items will be exported.</p> <div> 10/3/94.Archive.Item1</div> <div> 10/3/94.Archive.Item2</div> <div> 10/3/94.Archive.Item3</div> <p>You will be returned to the splash screen at the end of the export.</p>

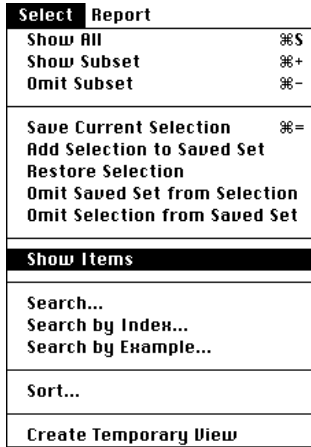
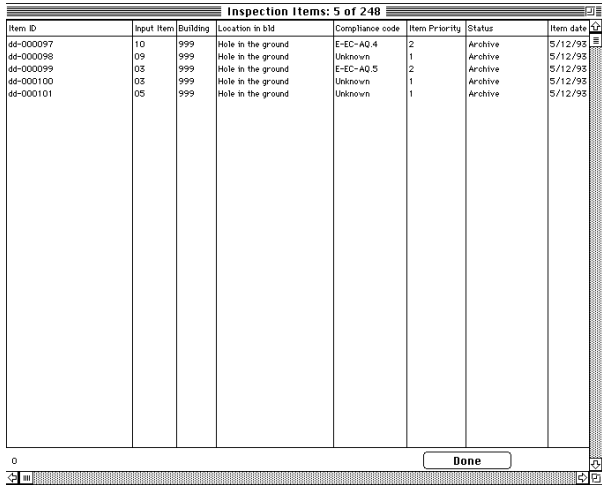
How to Use Show Items Features

Procedure

Use the following procedure to display items from the Inspection view or from the Compliance view.

Steps	Action
1.	<p>Choose Inspections from the View menu.</p> 
2.	<p>Highlight the Inspections or Compliance Code to display the Items associated with it.</p> 


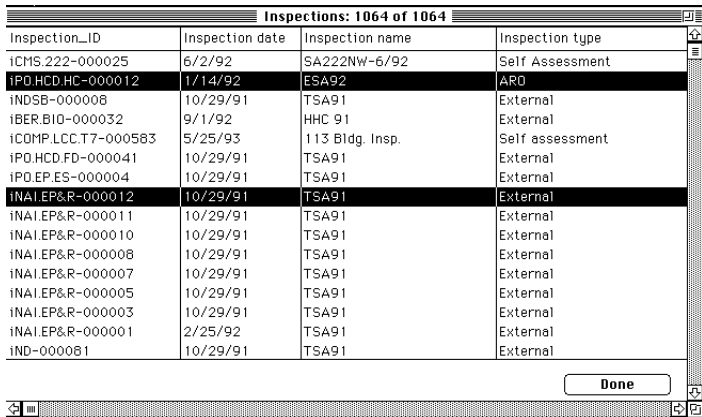
How to Use Show Items Features, Continued

Steps	Action
3.	<p>Select Show Items from the Select menu.</p>  <p>The following window will appear displaying all the items from the chosen Inspection(s) or Compliance Code(s).</p> 
4.	<p>You can now (if you have the proper access) modify, delete, perform global updates, browse and add special comments.</p>

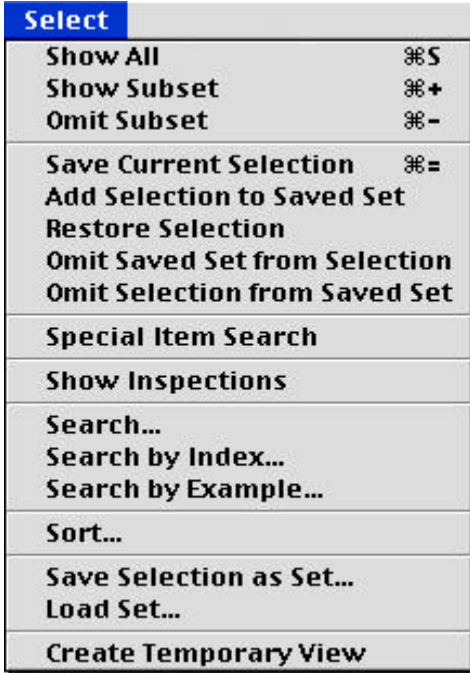
How to Use Show Inspections Feature

Procedure

Use the following procedure to display Inspection(s) from the Items view.

Steps	Action
1.	<p>Choose the Items from the View menu.</p> 
2.	<p>Highlight the Item(s) to display the Inspection(s) that are associated with it.</p> 

How to Use Show Inspections Feature, Continued


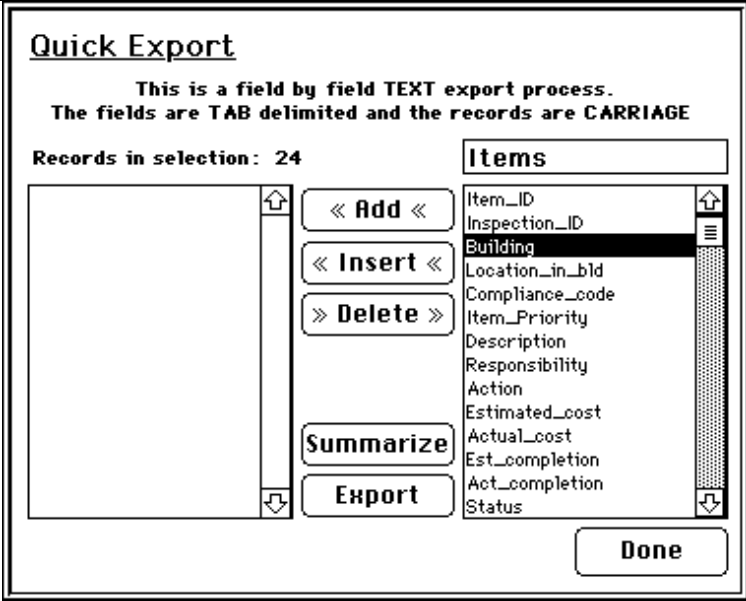
Steps	Action
3.	<p>Select Show Inspections from the Select menu.</p>  <p>The following window will appear displaying all the Inspection(s) from the chosen Item(s).</p>
4.	<p>You can now (if you have the proper access) modify, delete, perform global updates, browse and add special comments.</p>

Quick Export

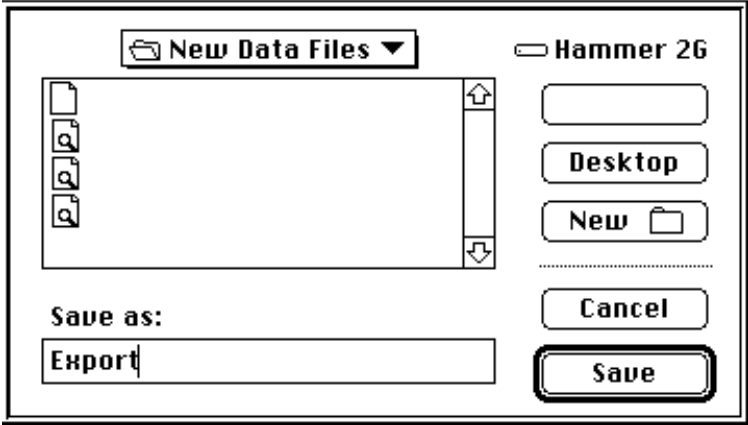
Export DefTrack Data to other applications

Background

Quick Export is a quick and easy way to export DefTrack information, in a Tab delimited format, to other applications such as a word processing program, spreadsheet, or another database program.

Steps	Action
1.	Perform a search to find the information that you want to export out of DefTrack.
2.	<p>When the search is complete go to the Report menu and choose Quick Export.</p> 
3.	 <ul style="list-style-type: none"> • Add - Adds the Highlighted item. • Insert - Inserts the Highlighted item. • Delete - Deletes the Highlighted item in the Field export box. • Summarize - Produces a count of selected items. • Export - Exports all the selected item fields.

Quick Export, Continued

Steps	Action																																																		
4.	When finished Adding or Inserting fields, click on the Export or Summarize Button.																																																		
5.	 <p>Give your export file a name in the Save as: dialog box, click Save to export file.</p> <p>Your file will be exported to the location you specified.</p>																																																		
6.	<p>Open the exported file in Excel or Word.</p> <table border="1"> <thead> <tr> <th>Building</th> <th>Count</th> </tr> </thead> <tbody> <tr><td>366</td><td>1</td></tr> <tr><td>364</td><td>3</td></tr> <tr><td>364</td><td>8</td></tr> <tr><td>364</td><td>1</td></tr> <tr><td>364</td><td>4</td></tr> <tr><td>364</td><td>1</td></tr> <tr><td>364</td><td>1</td></tr> <tr><td>364</td><td>1</td></tr> <tr><td>364</td><td>1</td></tr> <tr><td>LLNL</td><td>7</td></tr> <tr><td>LLNL</td><td></td></tr> <tr><td>LLNL</td><td></td></tr> <tr><td>LLNL</td><td></td></tr> <tr><td>LLNL</td><td></td></tr> <tr><td>LLNL</td><td></td></tr> <tr><td>LLNL</td><td></td></tr> <tr><td>332</td><td></td></tr> <tr><td>332</td><td></td></tr> <tr><td>332</td><td></td></tr> <tr><td>412</td><td></td></tr> <tr><td>412</td><td></td></tr> <tr><td>412</td><td></td></tr> <tr><td>412</td><td></td></tr> <tr><td>251</td><td></td></tr> </tbody> </table> <p>Export Summarize</p>	Building	Count	366	1	364	3	364	8	364	1	364	4	364	1	364	1	364	1	364	1	LLNL	7	LLNL		LLNL		LLNL		LLNL		LLNL		LLNL		332		332		332		412		412		412		412		251	
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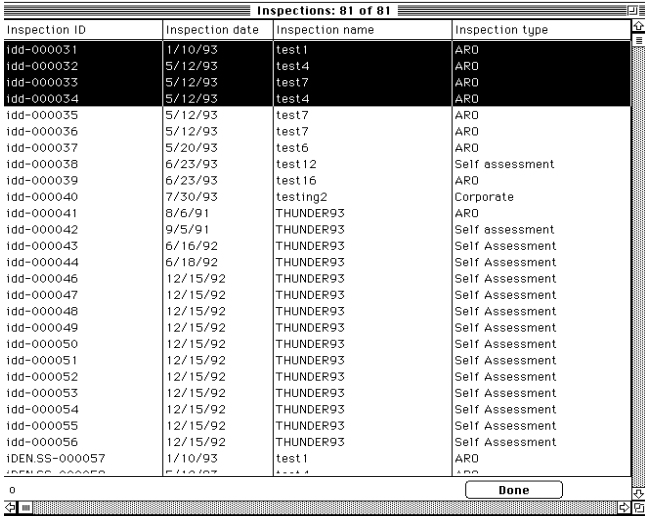
How to Use the Global Update Features

Background

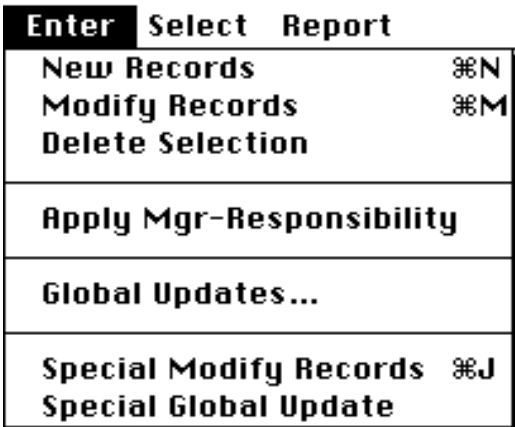
Global Update is used to globally modify selected Item(s)/Inspection(s) field(s).

Warning

Make sure you really want to make global changes to your database. There is no "UNDO". If you do want to proceed, make a backup of your data file before starting up the DefTrack application.

Steps	
1.	<p>Select the appropriate entry from the View menu.</p> 
2.	<p>Highlight the records to be modified or perform a search to narrow down the record set to be modified.</p> 

How to Use the Global Update Features, Continued

Steps	Action
3.	<p>Select Global Updates... from the Enter menu.</p>  <p>The screenshot shows a menu titled 'Enter' with the following items: 'New Records' (with keyboard shortcut ⌘N), 'Modify Records' (with keyboard shortcut ⌘M), 'Delete Selection', 'Apply Mgr-Responsibility', 'Global Updates...', 'Special Modify Records' (with keyboard shortcut ⌘J), and 'Special Global Update'.</p>
	<p>Depending on which view you choose the Inspection or the Items global change view will be displayed.</p>

Global Items View:

Apply Global Updates

This is a global change.
It can NOT be undone once it is applied to the selection.
Select the appropriate field from the list and key in the new contents in the place provided.

[Items]Item_ID	<	[Items]Item_ID
<input checked="" type="radio"/> Replace <input type="radio"/> Insert <input type="radio"/> Append		[Items]Inspection_ID [Items]Building [Items]Location_in_bld [Items]Compliance_code [Items]Item_Priority [Items]Description [Items]Responsibility [Items>Action [Items]Estimated_cost [Items]Actual_cost [Items]Est_completion [Items]Act_completion [Items>Status [Items]Work_order [Items]Account_no [Items]Item_date [Items]InputItem [Items]Org_code [Items]Manager
<input type="radio"/> Edit		
Old		
Replace		
Apply Change	Done	

How to Use the Global Update Features, Continued

Global Inspections View:

Apply Global Updates

This is a global change.
It can NOT be undone once it is applied to the selection.
Select the appropriate field from the list and key in the new contents in the place provided.

[Inspections]Inspection_ID

☒ **Replace**
☐ **Insert**
☐ **Append**

☐ **Edit**

Old

Replace

« **[Inspections]Inspection_ID** ↑

[Inspections]Inspection_date

[Inspections]Inspection_type

[Inspections]Inspection_team

[Inspections]Remarks

[Inspections]Disposition

[Inspections]Inspection_name



Steps	Action
4.	<p>Highlight the field, in the Field Selection Window, that you want to globally change. You are only allowed to change one field at a time.</p> <p>Input the change(s) in the Input Window.</p> <p>To replace/insert/append data in the selected field with the information in the Input Window click on Replace, Insert, or Append button depending on what action you want to take.</p>
Note	<p>You will not be able to use "Closed" in the [Items]Status field.</p> <p>To apply the change click on the Apply Change button otherwise click on Done to exit the process.</p> <p>You may click on Done at any time to end the process.</p>
Note	<p><i>Replace - Replaces all the new data in the selected field.</i></p> <p><i>Insert - Inserts the new data before the old data in the selected field.</i></p> <p><i>Append - Appends the new data after the old data in the selected field</i></p>

How to Use the Global Update Features, Continued

Steps	Action
5.	<p>If you have more changes to make in the present view and selection redo step 4, otherwise click on Done.</p> <p>You will be returned to the either the Inspections or the Items view, depending on which view you selected in step 1.</p> <p>You may now select different records to globally change within your present view or change views and select a new record set to globally change.</p> <p>If there are no other changes to be made, click on Done to be returned to the splash screen.</p> <p>Global unique string change:</p> <p>To perform a global change of a unique string of characters, in a specific field, perform the following:</p> <p>Check the edit radio button.</p> <p>Input the unique string you want to change in the Old box.</p> <p>Input the new unique character string in the Replace box.</p> <p>Click Apply Change.</p>

How to Use the Global Update Features, Continued

The Item Responsibility and Manager fields can be changed globally from the Items view by using the **Apply Mgr-Responsibility** command.

Steps	Action
1.	Find and select the Items with the manager or responsible fields you wish to globally change.
2.	Choose Apply Mgr-Responsibility from the Enter menu. <div></div>
3.	A Dialog window similar to the following will appear: <div></div> <p>Click OK if the number of records displayed are correct or click Cancel if you do not want to continue..</p>

The following Dialog box will appear requesting you to fill-one or both of the boxes.

How to Use the Global Update Features, Continued

Apply Manager and/or Responsibility

This is a global change.
It can not be undone once it is applied to the selection.
Either Manager or Responsibility or Both may be filled in.

Manager:

Responsibility:

Apply Change **Cancel**

4.	Fill-in the Manager or Responsibility field with the correct individuals name, click Apply Change to globally change the information on all the select item(s).
----	--

How to Back Up the Data Base and Monthly Roll Ups

Backup of Data base

Your DefTrack data base file (see icon below) should be backed up as you would any other important file on your computer.



Although you can reinstall the application with your original ES&H DefTrack applications, data files would be time-consuming to reconstruct. Valuable data could be lost if you have a problem with your computer or hard disk.

How to back up the DefTrack data base file depends on your individual system configuration and the size of your data file. Because data files tend to get large, it is recommended that you back up your data files onto a tape drive or removable hard disk, a file server, or a second hard disk drive.

You should do a backup every time you add a significant amount of data, or at least weekly. You should also do a backup before making any major change or update to your system, or of DefTrack-related applications.

Monthly roll ups


After completing your Directorate's monthly roll up, make a backup copy of the file before sending it electronically or by disk to the ARO. It is recommended that you keep the monthly backups for at least one calendar or fiscal year (whichever comes last) in case the transmitted file is lost or damaged.

Again, how you create a backup copy depends on the size of the file and your system configuration.

Add to Roll Up...

Add to Roll Up

Do the following to add items to the ARO Only Export file:

Steps	Administrator Action Only																																																																																																																																																																																																																																							
1.	If you've imported information from your users, go to step 2. If not, see section on How to Import Data.																																																																																																																																																																																																																																							
2.	From the splash screen, select ARO Only Export...from the file menu.																																																																																																																																																																																																																																							
3.	Verify the information in the message box, if correct click on OK.																																																																																																																																																																																																																																							
	<div><div></div><div><p>396 Items in File This is an I/ O database intensive process, it will take a long time to execute! Is this OK?</p><div><div>Print</div><div>Cancel</div><div>OK</div></div></div></div>																																																																																																																																																																																																																																							
4.	<div><div>ARO Only Export Inspection Items: 205 of 249</div><table><tr><th>Inspection ID</th><th>Item ID</th><th>Item Priority</th><th>Status</th><th>Building</th><th>Location in bld</th><th>Compliance</th></tr><tr><td>IDD.A/P-000010</td><td>DD.A/P-001017</td><td>3</td><td>Transferred</td><td>999</td><td>Hole in the ground</td><td>S-IS-ST</td></tr><tr><td>DDN.LAI-000046</td><td>DEN.LAI-000074</td><td>2</td><td>Archive</td><td>999</td><td>Hole in the ground</td><td>E-EC-VQ</td></tr><tr><td>DDN.LAI-000056</td><td>DEN.LAI-000070</td><td>2</td><td>complete</td><td>999</td><td>Hole in the ground</td><td>E-EC-PC</td></tr><tr><td>DDN.LAI-000044</td><td>DEN.LAI-000071</td><td>2</td><td>Archive</td><td>999</td><td>Hole in the ground</td><td>S-IS-EL</td></tr><tr><td>DDN.LAI-000031</td><td>DEN.LAI-000069</td><td>2</td><td>Archive</td><td>999</td><td>Hole in the ground</td><td>E-EC-AQ</td></tr><tr><td>DDN.LAI-000049</td><td>DEN.LAI-000084</td><td>2</td><td>complete</td><td>999</td><td>Hole in 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ground	E-EC-VQ	DDN.LAI-000056	DEN.LAI-000070	2	complete	999	Hole in the ground	E-EC-PC	DDN.LAI-000044	DEN.LAI-000071	2	Archive	999	Hole in the ground	S-IS-EL	DDN.LAI-000031	DEN.LAI-000069	2	Archive	999	Hole in the ground	E-EC-AQ	DDN.LAI-000049	DEN.LAI-000084	2	complete	999	Hole in the ground	S-IS-EL	DDN.LAI-000052	DEN.LAI-000090	2	complete	999	Hole in the ground	S-IS-EL	DDN.LAI-000056	DEN.LAI-000096	2	complete	999	Hole in the ground	S-IS-EL	DDN.LAI-000032	DEN.LAI-000097	2	Transferred	999	Hole in the ground	E-EC-AQ	DDN.LAI-000032	DEN.LAI-000099	2	Transferred	999	Hole in the ground	E-EC-AQ	DDN.LAI-000037	DEN.LAI-000103	3	closed	999	Hole in the ground	E-EC-NE	DDN.LAI-000036	DEN.LAI-000104	3	closed	999	Hole in the ground	E-EC-NE	DDN.LAI-000034	DEN.LAI-000105	2	closed	999	Hole in the ground	E-EC-AQ	DDN.LAI-000034	DEN.LAI-000106	2	closed	999	Hole in the ground	E-EC-AQ	DDN.LAI-000034	DEN.LAI-000107	2	closed	999	Hole in the ground	E-EC-AQ	DDN.LAI-000034	DEN.LAI-000108	2	closed	999	Hole in the 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150	H-ES-PP	ENGEE141.T7-000090	ENGEE141.T7-001375	2	complete	141	Bay 5, 150	H-ES-TR	ENGEE141.T7-000090	ENGEE141.T7-001742	2	complete	141	Bay 1, 1145, Hall	S-IS-MP
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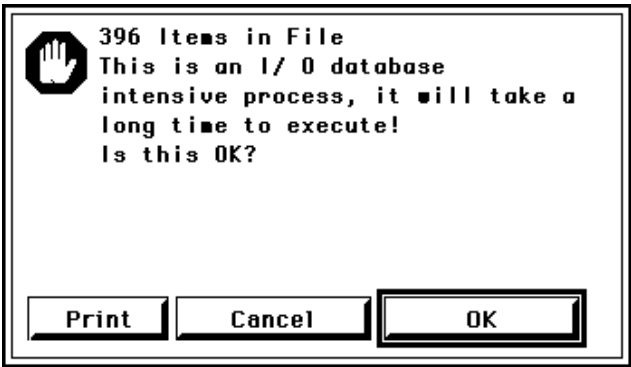

Add To Roll Up..., Continued.

Steps	Action																								
5.	<p>The following window appears displaying the all the items that can be added to the Roll Up file. Select the items you want to add to the roll up file, select Show Subset, and then click on the Add to Roll Up button. The selected items will now be added to your roll up file.</p> <div><div>Add Items to ARO Roll Up Inspection Items: 3 of 50</div><div>Select Records for Roll Up Inclusion!</div><table><thead><tr><th>Inspection ID</th><th>Item ID</th><th>Item Priority</th><th>Status</th><th>Building</th><th>Location in b</th></tr></thead><tbody><tr><td>IND-000336</td><td>ND-002817</td><td>4</td><td>Closed</td><td>332</td><td>area</td></tr><tr><td>IND.TS2-000001</td><td>ND.TS2-000054</td><td>2</td><td>Archive</td><td>332</td><td>LLNL</td></tr><tr><td>IND.TS2-000001</td><td>ND.TS2-000055</td><td>2</td><td>Archive</td><td>332</td><td>LLNL</td></tr></tbody></table><div><div>Add to Roll Up</div><div>Cancel</div></div></div> <p>Continue with steps 3-5 in the ARO Only Export procedure.</p>	Inspection ID	Item ID	Item Priority	Status	Building	Location in b	IND-000336	ND-002817	4	Closed	332	area	IND.TS2-000001	ND.TS2-000054	2	Archive	332	LLNL	IND.TS2-000001	ND.TS2-000055	2	Archive	332	LLNL
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Recordless Roll up

Background

Perform the following to produce a recordless roll up to the Assurance Review Office:

Steps	Administrator Action Only
1.	If you've imported information from your users, go to step 2. If not, see section on How to Import Data.
2.	From the splash screen, select ARO Only Export... from the File menu.
3.	Verify the information in the message box, if correct click on OK . 
4.	The following Dialog box will indicate that there are no items to be rolled up.  Select Recordless Roll Up , from the Enter Menu .

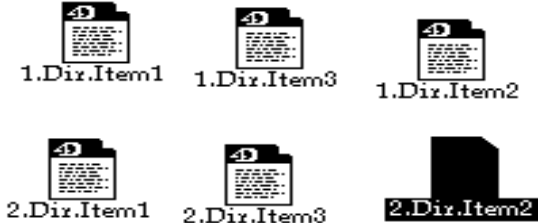

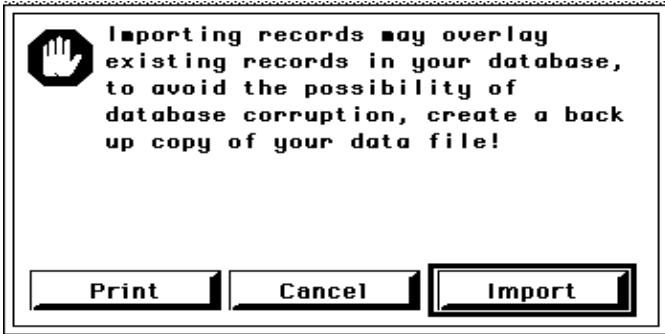
Recordless Roll up, Continued.

Steps	Action
5.	<div> Are you certain you wish to do a recordless roll up?</div> <div><input type="button" value="Print"/> <input type="button" value="Cancel"/> <input type="button" value="Export"/></div> <p>Click on Export to create the item 1,2, and 3 files for your recordless roll up.</p>
6.	Deliver the files created (Org_code.dateitem 1, 2, and 3 files) to ARO.

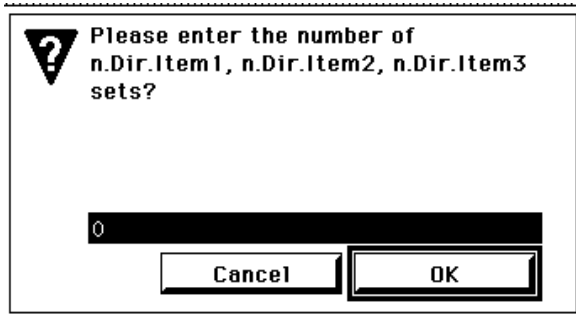
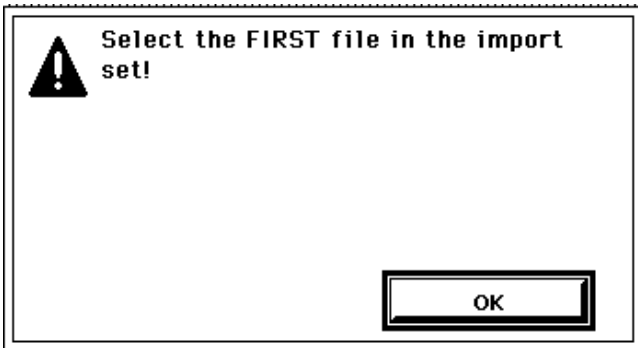
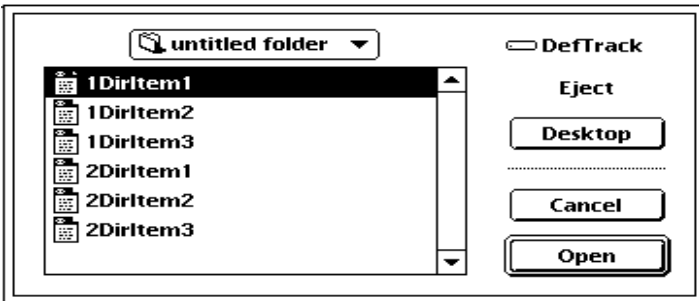
Multiple Files Import

Background

To import multiple user files use the procedure Multiple Users in the DBA utilities menu - **File/DBA utilities/Import/Multiple Users**.

Steps	Administrator Action Only
1.	<p>Before you begin importing your multiple Dir.item1 or Dir.item2 or Dir/item3 files you must add a set number in front of the Dir prefix. For example if you had 2 sets Dir files, you would add 1 to the first set and 2 to the second set of Dir files.</p> <div style="text-align: center;">  </div>
2.	Launch the DefTrack application.
3.	From the splash screen click on the File menu and highlight DBA utilities.
4.	<p>When in the DBA utilities window, click on Import and highlight Multiple users...</p> <div style="text-align: center;">  </div> <p>and the following window will appear.</p> <div style="text-align: center;">  </div>

Multiple Files Import, Continued



Steps	Action
5	<p>Click on Import and the following window will appear asking you how many sets of Dir files are you importing.</p>  <p>Fill in the number of sets and click OK.</p>
6.	 <p>Click OK.</p>
7.	 <p>Highlight the first item and click on Open to import all items or Cancel to discontinue the process.</p>

Merge Inspections

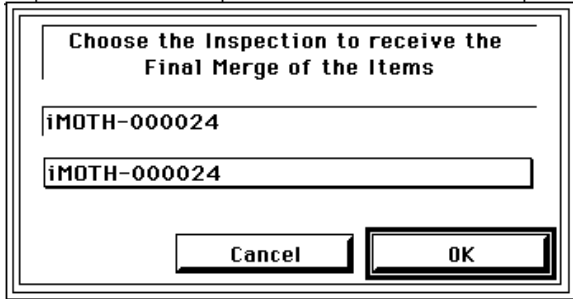
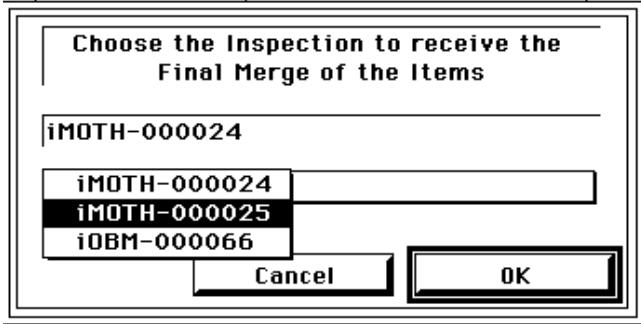
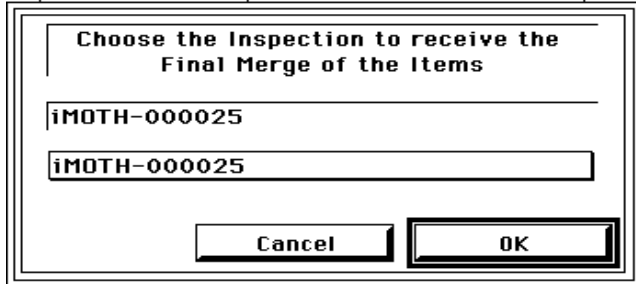
Merge Inspections

Background


When you need to merge multiple inspections, use the Merge Inspections command. **Merge inspections performs an internal transfer of items from one inspection to the other.**

Steps	Administrator Action Only
1.	From the Splash Screen click on the File menu and highlight DBA utilities .
2.	<p>When in the DBA utilities window, click on Utilities and highlight Merge Inspections.</p>  <p>A window containing all your inspections will appear.</p>
3.	<p>Select the Inspections that you want to merge, either by performing a search or highlighting the inspections.</p> <p>Make sure you have performed a Show Subset from the Select menu before you go to the next step.</p>
4.	<p>Now that you have selected the Inspections you want to merge go to Enter/Merge Inspections...</p> 

Merge Inspections, Continued

Steps	Action
5	<p>The following window will appear asking you to choose the Inspection that will be the receiver of the items.</p>  <p>Two boxes will be displayed with inspection id's. The top box contains the inspection id of the receiving inspection and the bottom box contains a pop down list of selected Inspections.</p>
6.	<p>Click in the bottom box to choose the Inspection that you want to merge your Inspections into.</p> 
7.	<p>The top box will now display the receiving Inspection.</p>  <p>Click OK.</p>

Merge Inspections, Continued

Steps	Action
8.	<p>The Following dialog box appears:</p>  <p>Click OK to merge the Inspections or Cancel to discontinue the merge process.</p>
9.	<p>When the merge process is complete you will be sent back to the Splash Screen.</p>

Organization Codes


Background Each Directorate has been assigned a 2 to 4 letter Organization Code by the Assurance Review Office (ARO) to generate unique alphanumeric identifiers for Inspection and Item Id's, so that upon roll-up to the ARO's Institutional DefTrack database all the Inspections and Items from the Institution can be uniquely identified.

If a given Directorate decides to delegate tracking responsibilities to other organizations within their Directorate, each of those organizations must have a unique 1 to 7 character sub-node Organization code assigned to it.

Example

- ARO assigned Organization Code ALPH to Directorate ABC. The Inspection Id would be displayed like this iALPH-0000001.
- ABC Directorate assigns tracking responsibilities to Group XYZ and gives them a sub-node of BET. The Inspection Id for Group XYZ would be a combination of the Parent organization and the Child group and would be displayed like this iALPH.BET-0000001.

Adding Org Codes

Steps	Administrators Action Only
1.	<p>To add a new organization Org code go to File/DBA Utilities.</p>  <p>The screenshot shows a menu bar with 'File', 'Edit', 'View', 'Enter', and 'Select'. The 'File' menu is open, displaying the following options: 'About the database...', 'Help...' (with a keyboard shortcut ⌘H), 'Access...', 'ARO Utilities', 'DBA Utilities' (highlighted in black with a keyboard shortcut ⌘U), 'ARO Analysis...', and 'Delete All Records...'.</p>


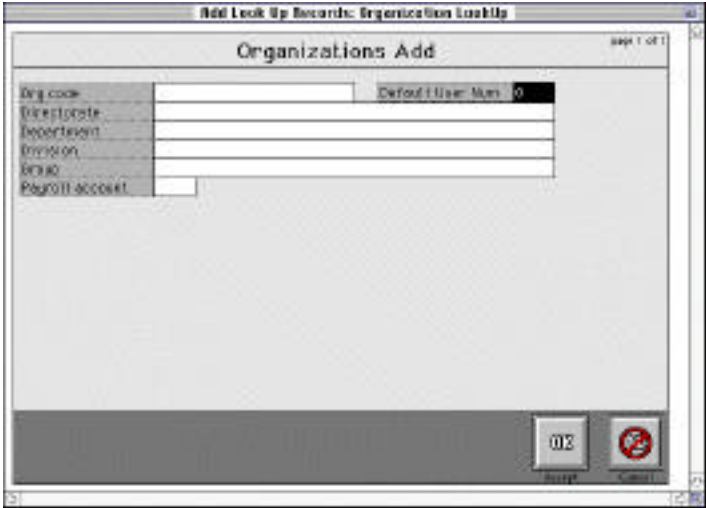
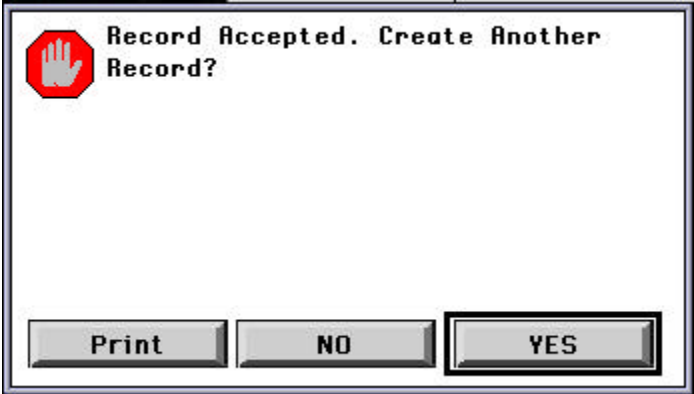
Organization Codes, Continued

Steps	Action
2.	<p>When you are in the DBA Splash Screen go to Utilities/Default Organization.</p> 

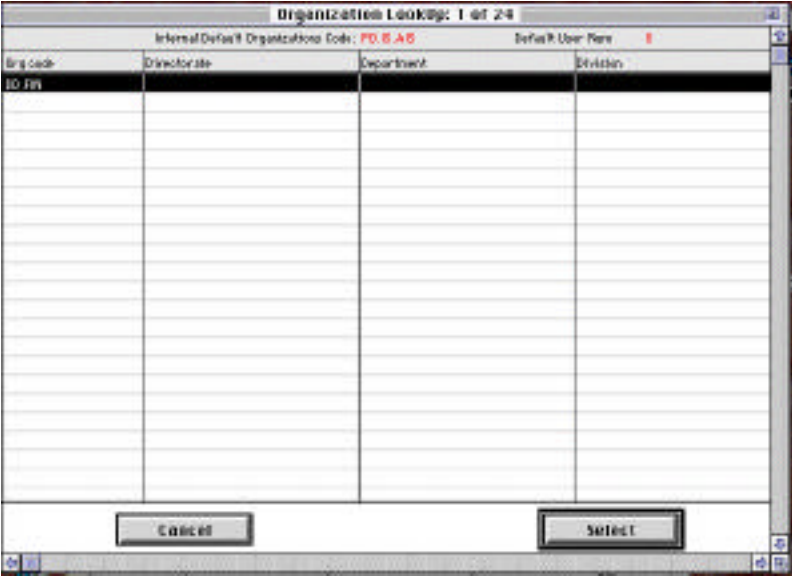

A window similar to this will appear:

[illegible]

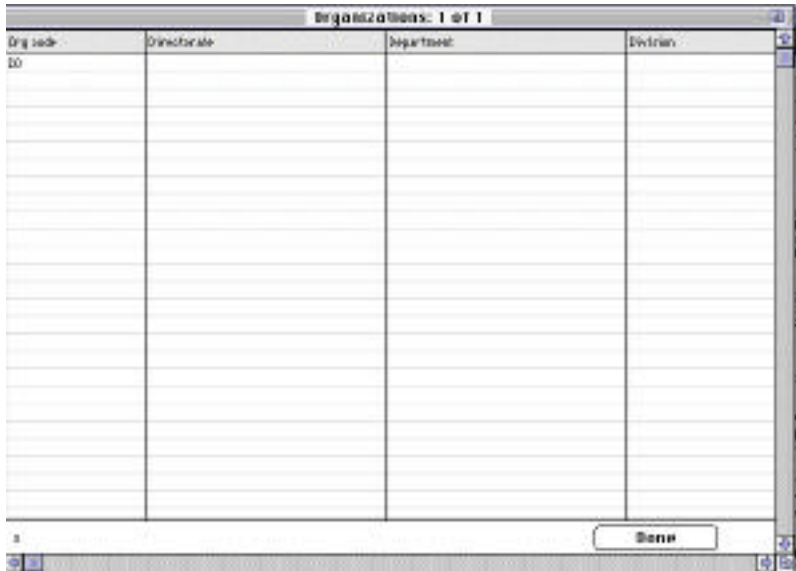
Organization Codes, Continued

Steps	Action
3.	<p>Go to Enter/New Records to enter in a new Organization code.</p> 
4.	 <p>Fill in the Org_code Field, the other fields are optional. Then click the Accept button to save the data.</p>
5.	 <p>Click Yes to create another Org_Code or click No to exit this dialog box.</p>



Organization Codes, Continued

	Steps	Action
Selecting the Default Org_Code	6.	<p>Highlight the Organization code to be set into the datafile, then click the Select button.</p> 
	7.	<p>From the DBA Splash Screen go to File/Return to Main Menu to be returned to the Main Menu Splash Screen</p>  <p>File Edit Import Utilities</p> <p>About the database... ⌘A</p> <p>Help... ⌘H</p> <p>Return to Main Menu ⌘R</p> <p>Quit ⌘Q</p> <p>Notes <i>If you have added a new organization code to your Users datafiles, make sure you add this same Org_Code to your own datafile so you have a record of all the codes within your Organization.</i></p>

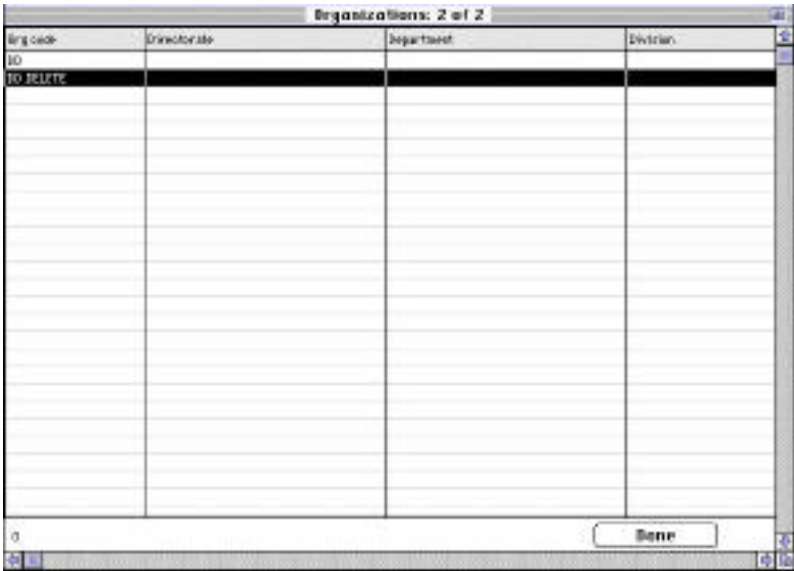
Organization Codes, Continued

Steps	Action																																								
1.	<p>From the Splash Screen go View/Organizations.</p> <div><table><thead><tr><th>View</th><th>Enter</th><th>Select</th><th>Initializ</th></tr></thead><tbody><tr><td>Inspections</td><td></td><td></td><td>⌘1</td></tr><tr><td>All Inspection Items</td><td></td><td></td><td>⌘2</td></tr><tr><td>Verifications</td><td></td><td></td><td>⌘3</td></tr><tr><td>Item Priorities</td><td></td><td></td><td>⌘4</td></tr><tr><td>Compliance Codelist</td><td></td><td></td><td>⌘5</td></tr><tr><td>Codelist Usage Areas</td><td></td><td></td><td>⌘6</td></tr><tr><td>Organizations</td><td></td><td></td><td>⌘7</td></tr><tr><td>Items: Next ARO Roll Up</td><td></td><td></td><td>⌘8</td></tr><tr><td>Items: Last ARO Roll Up</td><td></td><td></td><td>⌘9</td></tr></tbody></table></div>	View	Enter	Select	Initializ	Inspections			⌘1	All Inspection Items			⌘2	Verifications			⌘3	Item Priorities			⌘4	Compliance Codelist			⌘5	Codelist Usage Areas			⌘6	Organizations			⌘7	Items: Next ARO Roll Up			⌘8	Items: Last ARO Roll Up			⌘9
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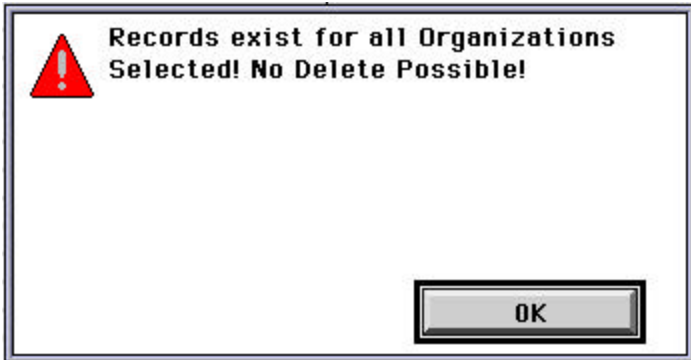
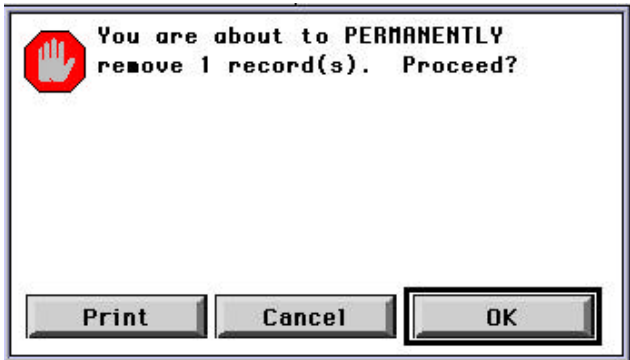
Organization Codes, Continued

Steps	Action
3.	<p>Go to Enter/Modify Records.</p> 
4.	<p>Make your modifications in the following window:</p>  <p>Click the Accept button to accept the modifications.</p>
5.	<p>You may make more modifications when you are returned to the Organizations view.</p> <p>If you are finished making modifications click the Done button.</p>

Organization Codes, Continued


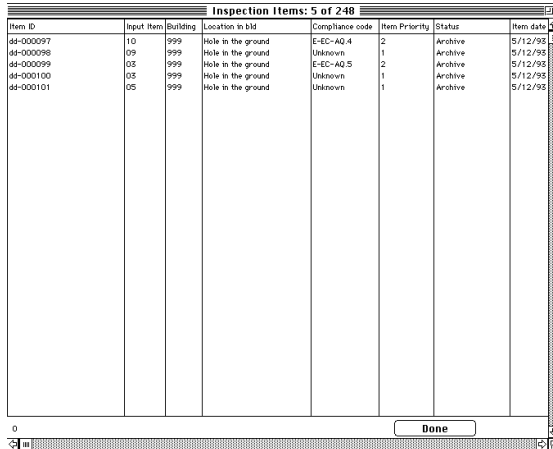
Steps	Action																																								
Deleting Organization Codes	<div>1.</div> <div>From the Splash Screen go View/Organizations.</div> <div><table><tr><th>View</th><th>Enter</th><th>Select</th><th>Initializ</th></tr><tr><td>Inspections</td><td></td><td></td><td>⌘1</td></tr><tr><td>All Inspection Items</td><td></td><td></td><td>⌘2</td></tr><tr><td>Verifications</td><td></td><td></td><td>⌘3</td></tr><tr><td>Item Priorities</td><td></td><td></td><td>⌘4</td></tr><tr><td>Compliance Codelist</td><td></td><td></td><td>⌘5</td></tr><tr><td>Codelist Usage Areas</td><td></td><td></td><td>⌘6</td></tr><tr><td>Organizations</td><td></td><td></td><td>⌘7</td></tr><tr><td>Items: Next ARO Roll Up</td><td></td><td></td><td>⌘8</td></tr><tr><td>Items: Last ARO Roll Up</td><td></td><td></td><td>⌘9</td></tr></table></div>	View	Enter	Select	Initializ	Inspections			⌘1	All Inspection Items			⌘2	Verifications			⌘3	Item Priorities			⌘4	Compliance Codelist			⌘5	Codelist Usage Areas			⌘6	Organizations			⌘7	Items: Next ARO Roll Up			⌘8	Items: Last ARO Roll Up			⌘9
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Organization Codes, Continued

Steps	Action
3.	<p>Go to Enter/Delete Selection.</p> 
4.	<p>This dialog box will be displayed if you choose an Organization code that is being used in your datafile. You can not delete organization codes that are presently being used in your datafile.</p>  <p>Click OK.</p>
5.	<p>This warning dialog box will appear to let you know that you are about to delete a record.</p>  <p>Click OK to continue the process or Cancel to discontinue the process.</p>










How to Use the Special Guest Features

Use the procedure to add special comments (Date, Comments, and Name) to Inspections.










Steps	Special Guest, Admin, and Designer Action Only
1.	<p>Select the appropriate entry from the View menu.</p> 
2.	<p>Highlight the records to be modified.</p> 
3.	Select Special Modify Records from the Enter menu.
4.	Go to page S3 for Inspections or go to page S 3 for items and Edit the appropriate fields. See the Special layouts on the following page.
5.	To save the changes entered, click on Accept after all changes have been made to the records.

How to Use the Special Guest Features, Continued

Special Inspection Layout:

Inspection_ID iff-000009	ES&H Inspection Special	page 3 of 3
Special Date	07/06/1993	
Special Name	dennis	
Comments	first comment	
<div>        </div> <div>Record First Prev Next Last Prev page Next page Accept Cancel</div>		

Special Item Layout:

Item_ID SSDPFD.T7-001373	Inspection Item Special	page 4 of 4
Special Date	00/00/00	
Special Name	0	
Special Counter	0	
Special Text 1		
Special Text 2		
<div>        </div> <div>Record First Prev Next Last Prev page Next page Accept Cancel</div>		

How to Use the Special Guest Features, Continued

Procedure

Use this procedure to do a Special Global Update.

Steps	Special Guest, Admin, and Designer Action Only																																																																																																												
1.	<p>Select the appropriate entry from the View menu.</p> <div><div>View</div><div>Enter</div><div>Select</div><div>Initializ</div><table><tr><td>Inspections</td><td>⌘1</td></tr><tr><td>All Inspection Items</td><td>⌘2</td></tr><tr><td>Verifications</td><td>⌘3</td></tr><tr><td>Item Priorities</td><td>⌘4</td></tr><tr><td>Compliance Codelist</td><td>⌘5</td></tr><tr><td>Codelist Usage Areas</td><td>⌘6</td></tr><tr><td>Organizations</td><td>⌘7</td></tr><tr><td>Items: Next ARO Roll Up</td><td>⌘8</td></tr><tr><td>Items: Last ARO Roll Up</td><td>⌘9</td></tr></table></div>	Inspections	⌘1	All Inspection Items	⌘2	Verifications	⌘3	Item Priorities	⌘4	Compliance Codelist	⌘5	Codelist Usage Areas	⌘6	Organizations	⌘7	Items: Next ARO Roll Up	⌘8	Items: Last ARO Roll Up	⌘9																																																																																										
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2.	<p>Highlight the records to be modified.</p> <div><div>Inspections: 81 of 81</div><table><tr><th>Inspection ID</th><th>Inspection date</th><th>Inspection name</th><th>Inspection type</th></tr><tr><td>idd-000031</td><td>1/10/93</td><td>test1</td><td>ARO</td></tr><tr><td>idd-000032</td><td>5/12/93</td><td>test4</td><td>ARO</td></tr><tr><td>idd-000033</td><td>5/12/93</td><td>test7</td><td>ARO</td></tr><tr><td>idd-000034</td><td>5/12/93</td><td>test4</td><td>ARO</td></tr><tr><td>idd-000035</td><td>5/12/93</td><td>test7</td><td>ARO</td></tr><tr><td>idd-000036</td><td>5/12/93</td><td>test7</td><td>ARO</td></tr><tr><td>idd-000037</td><td>5/20/93</td><td>test6</td><td>ARO</td></tr><tr><td>idd-000038</td><td>6/23/93</td><td>test12</td><td>Self assessment</td></tr><tr><td>idd-000039</td><td>6/23/93</td><td>test16</td><td>ARO</td></tr><tr><td>idd-000040</td><td>7/30/93</td><td>testing2</td><td>Corporate</td></tr><tr><td>idd-000041</td><td>8/6/91</td><td>THUNDER93</td><td>ARO</td></tr><tr><td>idd-000042</td><td>9/5/91</td><td>THUNDER93</td><td>Self assessment</td></tr><tr><td>idd-000043</td><td>6/16/92</td><td>THUNDER93</td><td>Self Assessment</td></tr><tr><td>idd-000044</td><td>6/18/92</td><td>THUNDER93</td><td>Self Assessment</td></tr><tr><td>idd-000046</td><td>12/15/92</td><td>THUNDER93</td><td>Self Assessment</td></tr><tr><td>idd-000047</td><td>12/15/92</td><td>THUNDER93</td><td>Self Assessment</td></tr><tr><td>idd-000048</td><td>12/15/92</td><td>THUNDER93</td><td>Self Assessment</td></tr><tr><td>idd-000049</td><td>12/15/92</td><td>THUNDER93</td><td>Self Assessment</td></tr><tr><td>idd-000050</td><td>12/15/92</td><td>THUNDER93</td><td>Self Assessment</td></tr><tr><td>idd-000051</td><td>12/15/92</td><td>THUNDER93</td><td>Self Assessment</td></tr><tr><td>idd-000052</td><td>12/15/92</td><td>THUNDER93</td><td>Self Assessment</td></tr><tr><td>idd-000053</td><td>12/15/92</td><td>THUNDER93</td><td>Self Assessment</td></tr><tr><td>idd-000054</td><td>12/15/92</td><td>THUNDER93</td><td>Self Assessment</td></tr><tr><td>idd-000055</td><td>12/15/92</td><td>THUNDER93</td><td>Self Assessment</td></tr><tr><td>idd-000056</td><td>12/15/92</td><td>THUNDER93</td><td>Self Assessment</td></tr><tr><td>IDEN SS-000057</td><td>1/10/93</td><td>test1</td><td>ARO</td></tr></table><div>Done</div></div>	Inspection ID	Inspection date	Inspection name	Inspection type	idd-000031	1/10/93	test1	ARO	idd-000032	5/12/93	test4	ARO	idd-000033	5/12/93	test7	ARO	idd-000034	5/12/93	test4	ARO	idd-000035	5/12/93	test7	ARO	idd-000036	5/12/93	test7	ARO	idd-000037	5/20/93	test6	ARO	idd-000038	6/23/93	test12	Self assessment	idd-000039	6/23/93	test16	ARO	idd-000040	7/30/93	testing2	Corporate	idd-000041	8/6/91	THUNDER93	ARO	idd-000042	9/5/91	THUNDER93	Self assessment	idd-000043	6/16/92	THUNDER93	Self Assessment	idd-000044	6/18/92	THUNDER93	Self Assessment	idd-000046	12/15/92	THUNDER93	Self Assessment	idd-000047	12/15/92	THUNDER93	Self Assessment	idd-000048	12/15/92	THUNDER93	Self Assessment	idd-000049	12/15/92	THUNDER93	Self Assessment	idd-000050	12/15/92	THUNDER93	Self Assessment	idd-000051	12/15/92	THUNDER93	Self Assessment	idd-000052	12/15/92	THUNDER93	Self Assessment	idd-000053	12/15/92	THUNDER93	Self Assessment	idd-000054	12/15/92	THUNDER93	Self Assessment	idd-000055	12/15/92	THUNDER93	Self Assessment	idd-000056	12/15/92	THUNDER93	Self Assessment	IDEN SS-000057	1/10/93	test1	ARO
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3.	Select Special Global Update from the Enter menu.																																																																																																												
4.	<div><div></div><div>4 Records Are Selected for Global Update! Is this OK?</div><div><div>Print</div><div>Cancel</div><div>OK</div></div></div> <p>If the message is OK click OK otherwise click Cancel.</p>																																																																																																												

How to Use the Special Guest Features, Continued

Special Global Item Layout:

Apply Items Global Updates

This is a global change.
It can not be undone once it is applied to the selection.
Fill in the appropriate fields for update. The dollar sign (\$) is used to globally erase the contents of a field!

Special Date: Starting #: Iteration:

Special Name:

Special Text1:
☒ Replace Comments ☐ Insert Comments ☐ Append Comments

Special Text2:
☒ Replace Comments ☐ Insert Comments ☐ Append Comments

Special Global Inspection Layout:

Apply Inspections Global Updates

This is a global change.
It can not be undone once it is applied to the selection.
Fill in the appropriate fields for update. The dollar sign (\$)
is used to globally erase the contents of a field!

Special Date:

Special Name:

Comments:
☒ Replace Comments ☐ Insert Comments ☐ Append Comments

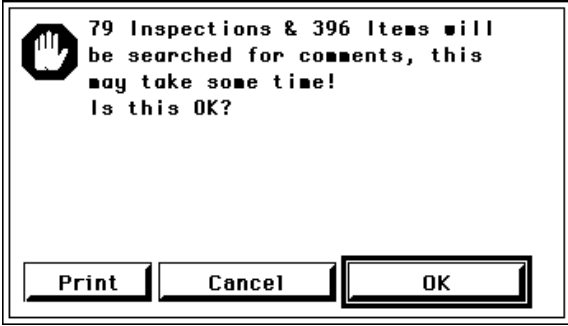
How to Use the Special Guest Features, Continued

Steps	Special Guest, Admin, and Designer Action Only
5.	Input the data that you want to globally add or append or insert. When done click on Apply Changes .

How to Export Special Guest Data

Export Comments

Do the following to export your comments data out of DefTrack:

Steps	Special Guest, Admin, and Designer Action Only
1.	From the splash screen go to the Enter menu and choose Export Comments...
2.	<div data-bbox="683 491 1247 814"></div> <p>The above dialog box will appear. If you want to continue click OK otherwise click Cancel.</p> <p>On OK a special file will be made containing all the special comments you entered in your personal data file. The special file have the file name Special prefixed with a date i.e.. Special.mm/dd/yy.</p>

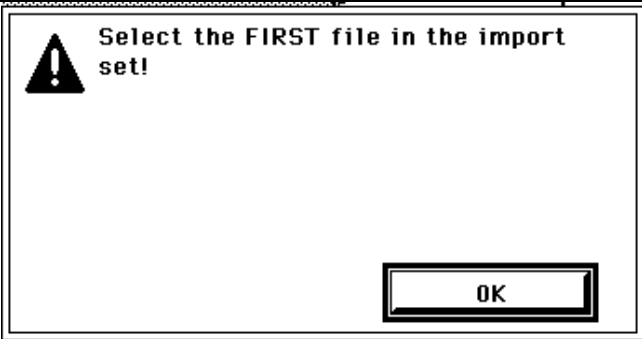
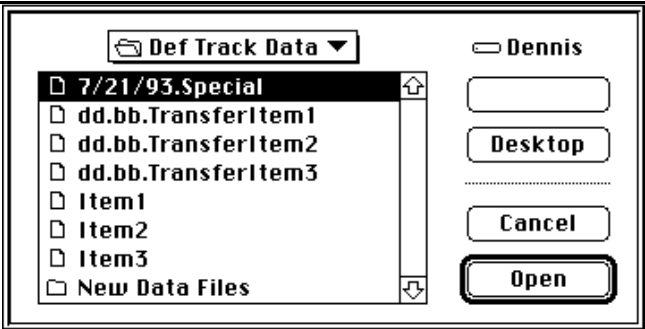
Warning:

You must export your special comments from your data file before you delete it and before you load a new DefTrack data file. If you don't you will lose all of your special comments that you've entered.

How to Import Special Guest Data

Import Comments

This import procedure is used to import items that have been exported using **Export Comments**. Both the Import/Export Comments choices can only be accessed by the Special Guest, Administrator and Designer only passwords.

Steps	Action for Special Guest, Admin., and Designer Only
1.	From the Splash screen choose Import Comments.. from the Enter menu.
2.	 <p>Click OK.</p>
3.	 <p>Choose the correct Special file and click Open. The import procedure will begin and you will be returned to the splash screen at the end of the process.</p> <p>Cancel will stop the process and return you to the splash screen.</p>

INDEX

Add Button 13
Add Selection To Saved Set 22
Add to roll up 67
Apply Mgr-Responsibility 64
Archive 43
Archive Delete 51
ARO Only Export 40
Comments - Export 42, 78
Comments - Import 50, 79
DefTrack Administrators Server 2
Delete - Archive 51
Delete button 18
Delete Records 17
Delete Selection 17
Display Inspections - Items View 56
Display Items - Inspections View 54
Export - Items Transfer 37
Export - Regular 36
Export Comments 42
Export Comments... 78
Export DefTrack Data to other applications 58
Export Special Guest Data 78
Export to ARO 40
Export to Directorate 39
Global unique string change 63
Global Update 60
Import - Item Transfer 47
Import - Regular 45
Import Comments 50
Import Comments.. 79
Import Special Guest Data 79
Item Transfer Import 47
Items Transfer Export 37
Launching DefTrack 5
Modify Records 16
New Inspections 11
New Items 13
Omit Saved Set from Selection 23
Omit Selection from Saved Set 23
Quick Report 26
Quick Report - Adding Fields 26
Quick Report - Delete Columns 27
Quick Report - Formatting 32
Quick Report - Headers and Footers 32
Quick Report - Insert Column 27
Quick Report - Inserting Break Levels 30

Quick Report - Loading Templates 35
Quick Report - Saving Templates 34
Quick Report - Size Columns 27
Quick Report - Sort Order 29
Recall Button 14
Restore Selection 22
Save Current Selection 22
Searching Parameters - Saving and Loading 20
Searching Records 19
Show Inspections 56
Show Items 54
Sort the Current Selection 24
Special Comments 73
Special Global Update. 75
Special Guest Features 73